Decorating Den Interiors

CLIENT MANAGEMENT SYSTEM

USER'S MANUAL

IDDCMS
client management system

WHAT **IS** THE CMS?

CMS stands for: **C**lient **M**anagement **S**ystem

- IT IS A COMPUTERIZED SYSTEM DEVELOPED BY TONY LANDRY IN 2005 FOR OUR OWN USE. TONY AND A COMPUTER PROGRAMMER SPENT OVER 1000 HOURS DESIGNING A SYSTEM WE COULD USE TO TRACK OUR CUSTOMER'S JOBS. WE WISH WE WOULD HAVE HAD IT WHEN WE STARTED OUR BUSINESS!

- WE HAD SO MANY REQUESTS BY OTHER OWNERS TO USE THE SYSTEM THAT WE WORKED WITH "RESULTS" TO MAKE IT AVAILABLE TO ALL FRANCHISE OWNERS.

- LIFESAVER FOR AN EXPANDING BUSINESS, OR ANY BUSINESS OWNER WHO WANTS TO BE ABLE TO TRACK ALL THEIR JOBS, PAST AND PRESENT

- NO MORE PAPERWORK TRAILS

- WEB-BASED, SO NO FEAR OF SYSTEM CRASHING

- SEVERAL OWNERS ACROSS THE COUNTRY ARE USING THE SYSTEM NOW

- SAVES TIME, $$$, AND ERRORS

- NO MORE HAND-CALCULATING ALL THOSE TOTALS, PERCENTAGES, AND DECORATOR COMMISSIONS

- ONCE A SALE IS ENTERED INTO S/COS, THE CMS AUTOMATICALLY PULLS OUT ALL INFO NEEDED & GENERATES ORDER FORMS TO FAX OR EMAIL

- YOU CAN ACCESS ALL OF YOUR CUSTOMER'S JOBS & CONTACT INFO FROM ANYWHERE YOU HAVE INTERNET ACCESS (GREAT WHEN YOU TRAVEL, OR WHEN YOU'RE JUST AWAY FROM YOUR OFFICE AND YOU NEED TO LOOK UP A CLIENT'S PHONE NUMBER OR CHECK STATUS ON A JOB)

- SAVED US FROM HIRING AN ADDITIONAL EMPLOYEE

IDDCMS
client management system

FEATURES:

TRACK JOB STATUS ON EVERY SALE FROM START TO FINISH

PROCESS ORDERS/NOTIFY RECEIVERS

GENERATE ORDER FORMS
(ENTER DATA ONCE INTO S/COS & ORDERS GENERATED AUTOMATICALLY)

PRODUCE SALES/COST OF SALES

PRODUCE SALES REPORTS

PRODUCE LEAD REGISTERS

AUTOMATIC BACKORDER REMINDERS

JOB COMPLETION NOTIFICATION SO YOU CAN SET UP INSTALLATION

TRACK OWNER/DECORATOR/TEAM SALES TOTALS

CALCULATE DECORATOR COMMISSIONS

GENERATE DIRECTIONS/MAP TO CUSTOMER'S HOUSE

WEB-BASED SYSTEM
(CAN ACCESS ANYWHERE, NO FEAR OF LOST DATA)

COST:

FIRST 30 DAYS FREE!

$250 SET-UP FEE + $100 PER MONTH

CONTACT:

MIKE STINSON @ RESULTS, INC.
W: (719)689-3007
results@rintuit.com

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Accessing the

CLIENT MANAGEMENT SYSTEM

ACCESSING THE CMS:

Open your preferred internet browser.

Go to: www.iddcms.com

Login with your personal Login and Password, obtained from Mike Stinson at Results, Inc: 719-689-3007 results@rintuit.com.

NOTE: CLICKING ON THE HOME ICON AT THE TOP OF THE PAGE WILL TAKE YOU TO THIS SCREEN FROM ANYWHERE IN THE CMS

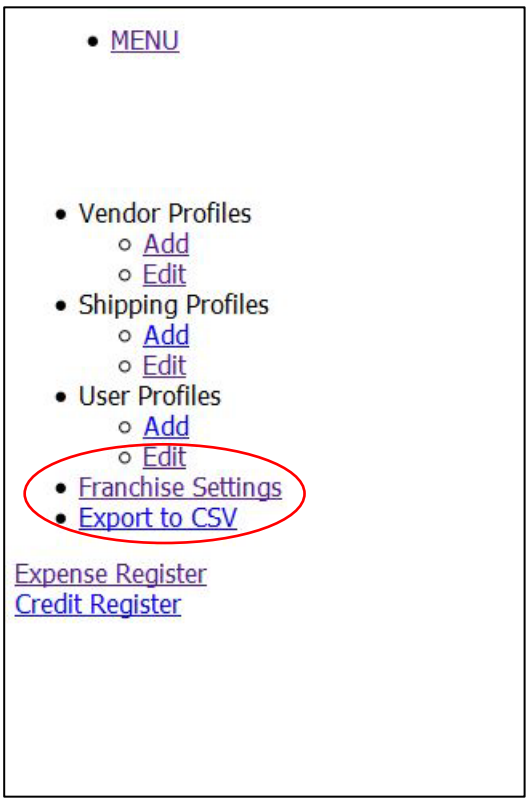
Setting up your

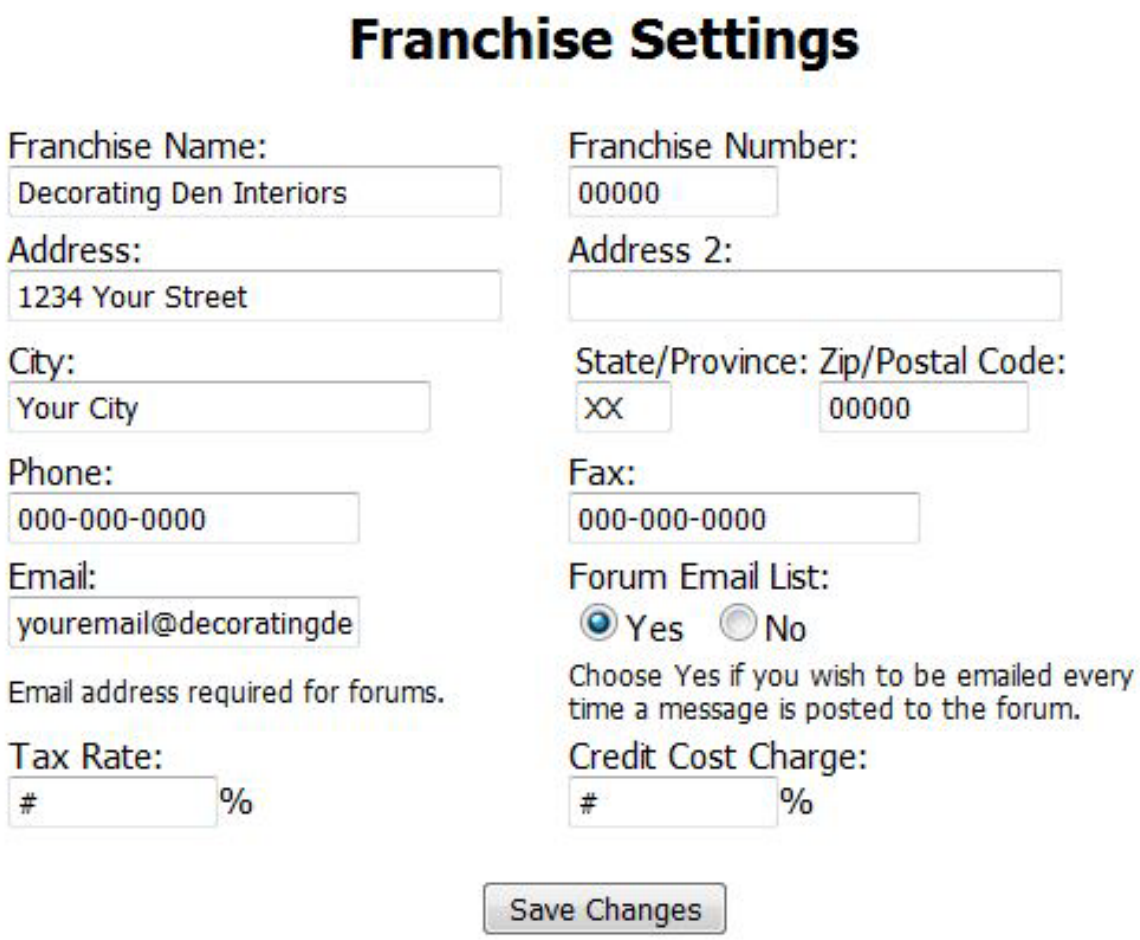
CLIENT MANAGEMENT SYSTEM

Input your Franchise Information

To enter your Franchise Information:

- Click on the **Settings Menu** at the top of the screen.
- This will take you to the Settings Menu, shown below.
- Click on Franchise Settings
- See next page for further instructions.





To Input Your Franchise Settings:

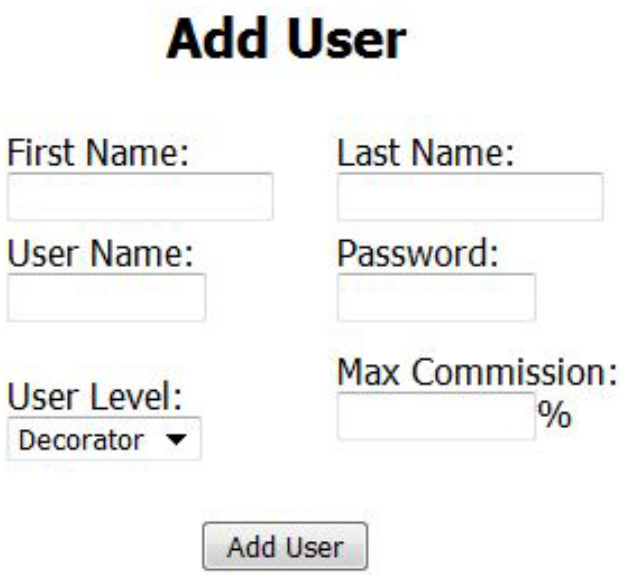
Fill in your Franchise Information into the form:

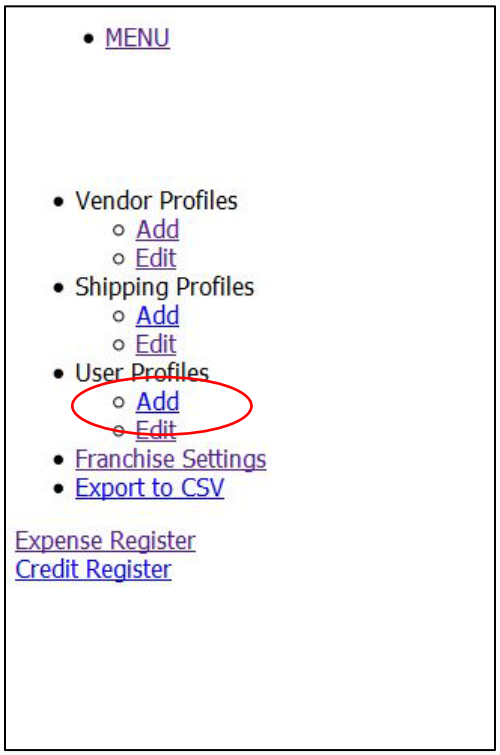
- YOUR Name, Address, Phone & Fax, Franchise Number, and email.
- Tax Rate - This is the sales tax rate in YOUR city.
- Credit Cost Charge - This is the credit card fee charged by YOUR provider.

- Save Changes.

NOTE: IT IS CRITICAL THAT BOTH YOUR TAX RATE AND CREDIT CARD COST CHARGE ARE KEPT UPDATED!! THESE VALUES AFFECT YOUR PROFIT MARGIN ON EACH JOB.

See next page....



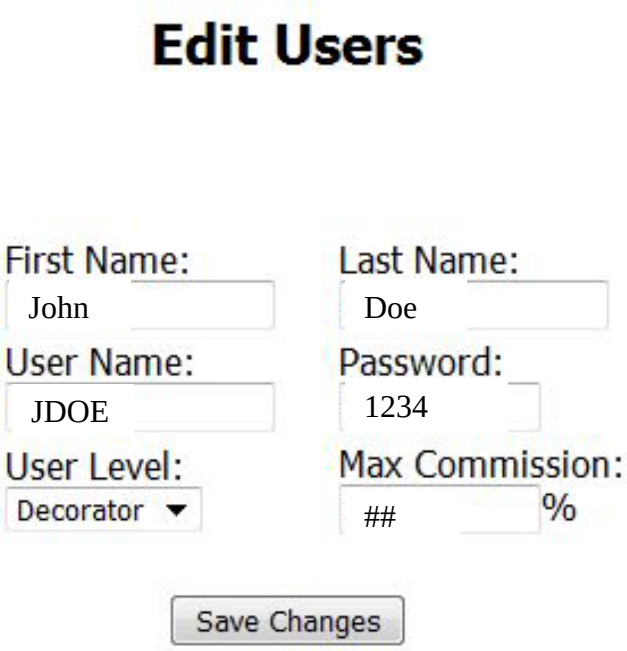


To Add a New User Profile:

This is an employee that will have access to the CMS.

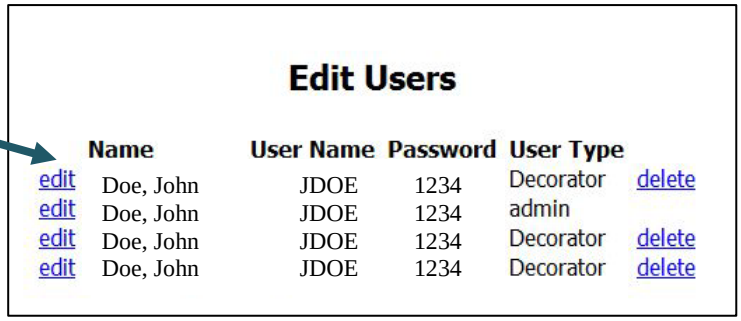
- Go to the Settings Menu (at the top of the screen on the Home page)
- Under User Profiles, Click on Add.
- Fill out the New User's Information:
  - First Name
  - Last Name
  - User Name (you assign)
  - Password (you assign)
  - User Level (you assign)
  - Max Commission - Fill this out ONLY for decorators who are not also owners!
- Click Add User.

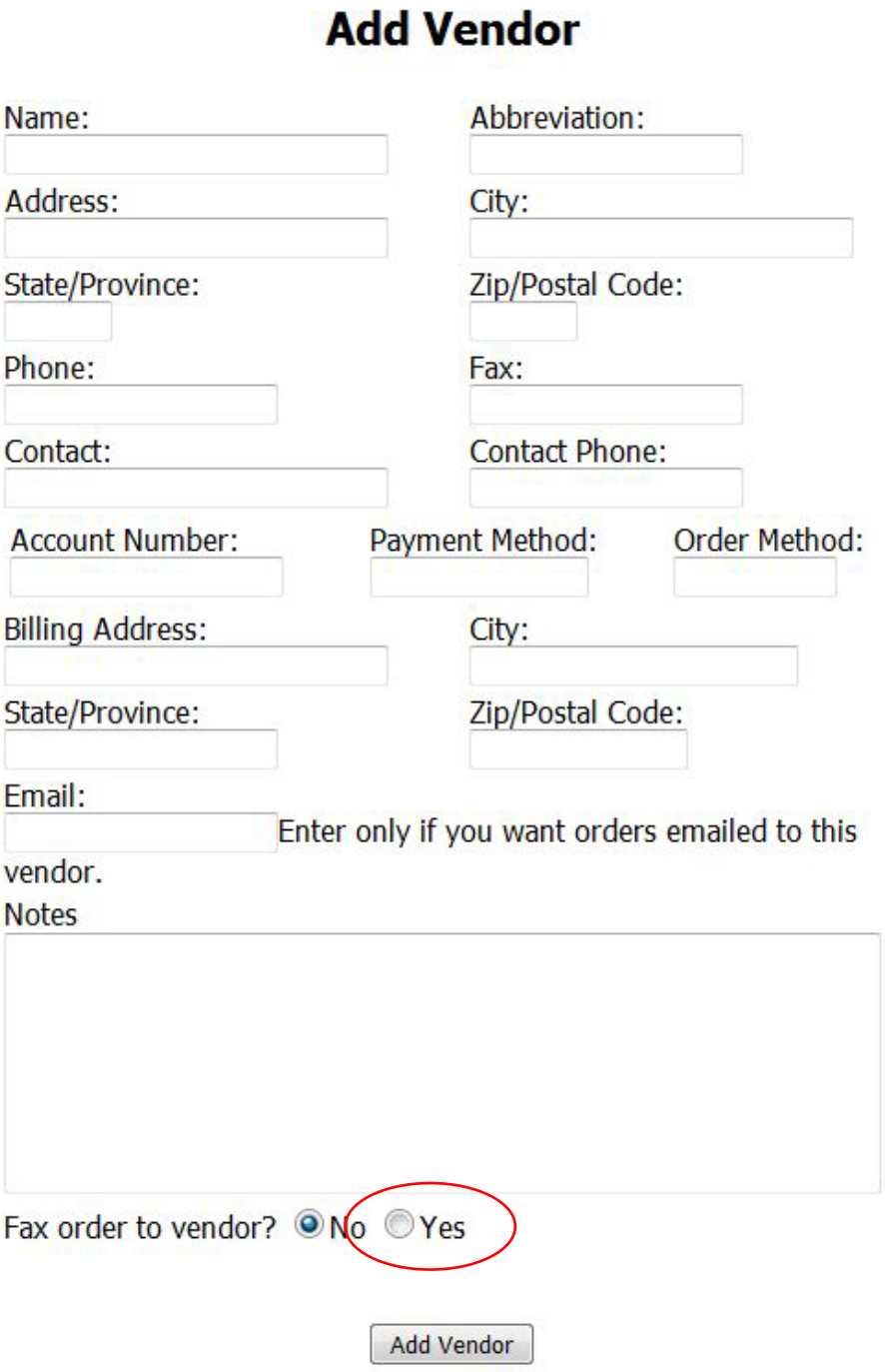
NOTE: IT IS IMPORTANT THAT YOU KEEP THE MAX. COMMISSION UPDATED, SO THAT THE CMS CAN CORRECTLY CALCULATE YOUR DECORATOR COMMISSIONS.



To Edit a User Profile:

- Under User Profiles, Click on Edit.
- Select the User you would like to edit.
- Correct the selected User's Information.
- Save Changes.





To Add a New Vendor Profile:

(A Vendor is any supplier that you use in your business.)

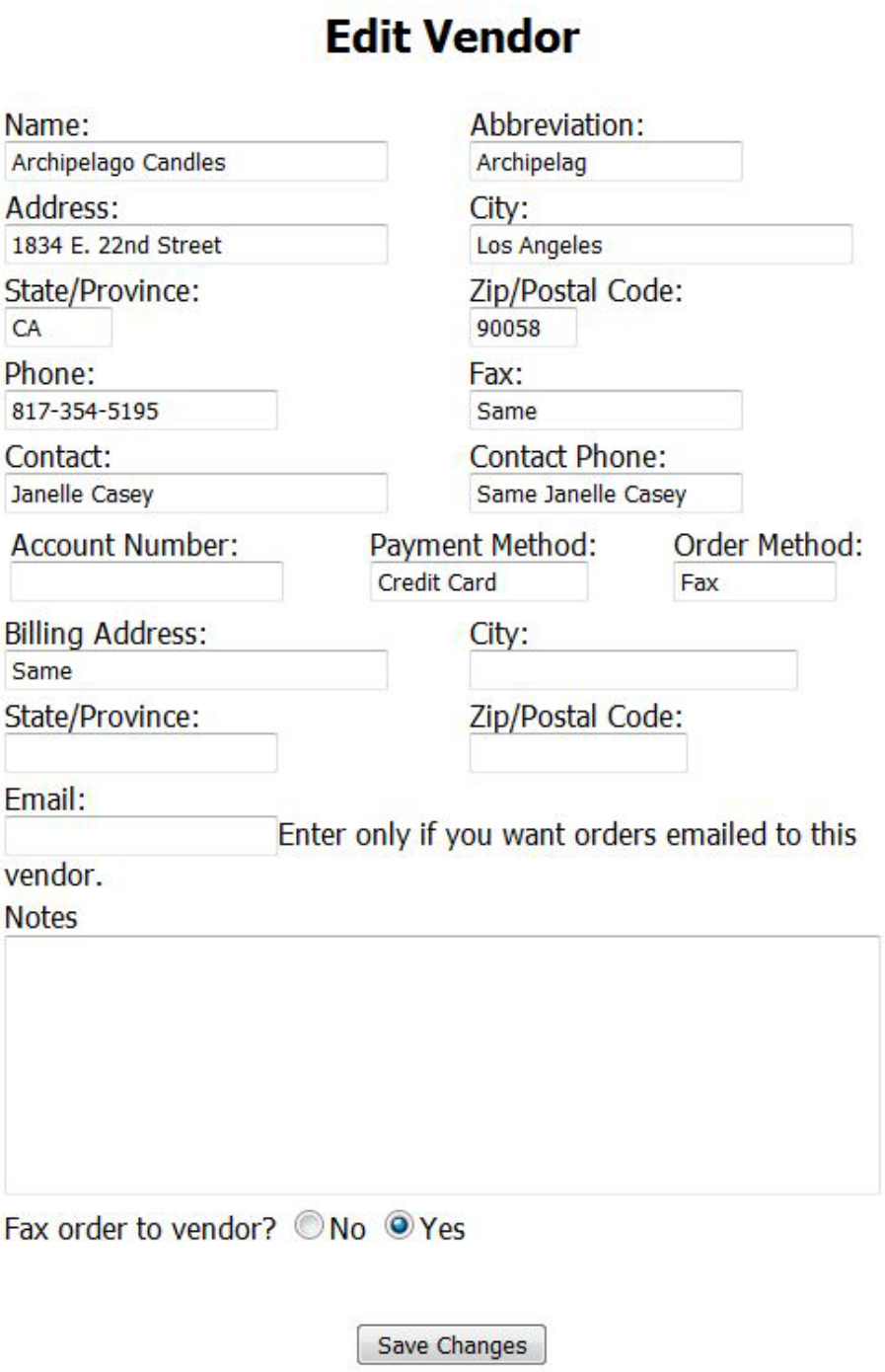
- Go to the Settings Menu (See page 6)
- Under Vendor Profiles, Click on Add.

Continued on next page...

To Add a New Vendor Profile (cont.):

- Fill out the New Vendor's Information.
    - Name - Vendors Full Company Name
    - Abbreviation - What the vendor will appear as in your vendor list on the CMS (max. 10 characters)
    - Address, City, State, Zip
    - Fax & Phone - Make sure to keep these up-to-date, as vendors report changes in their contact information.
    - Contact & Contact Phone - refers to the name and phone # of your contact with that vendor.
    - If you have an account # with this vendor(you will with most vendors), make sure to enter it here. It simplifies order entries on their end and makes things move more quickly for you. If not, leave this space blank.
    - Payment Method - Check, Credit, Net 30 days, Net 15 days, COD, etc.
    - Order Method - Fax, Online, Email, Phone
    - Notes - for your use to save any notes regarding special procedures for ordering
    - MAKE SURE TO CLICK **YES** ON "FAX ORDER TO VENDOR? "(below Notes) **IF** YOU WANT THE ORDER TO PRINT FROM THE CMS FOR YOU TO FAX.
- Click Add Vendor.

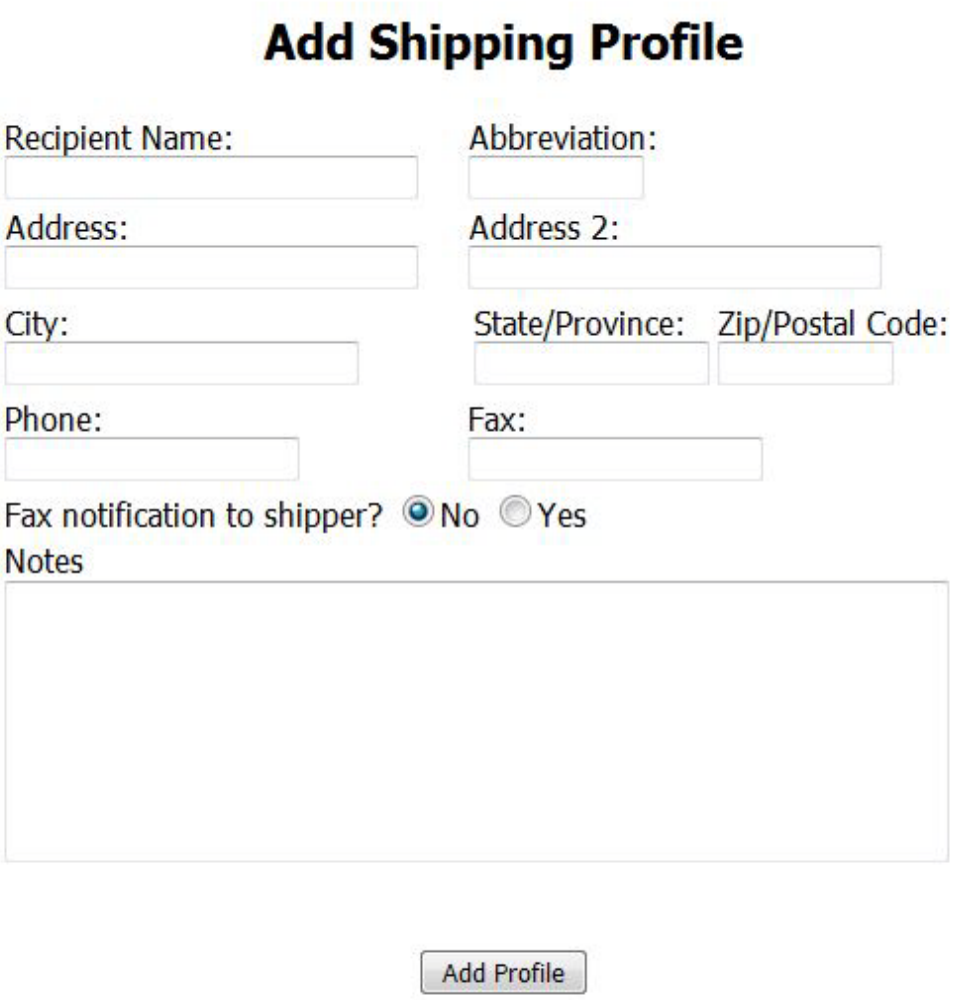
NOTE: THIS INFORMATION WILL BE PRINTED AT THE TOP OF ALL FAXED ORDERS . MAKE SURE TO TYPE EXACTLY AS YOU WANT YOUR PRINTED INFORMATION TO APPEAR.



To Edit a Vendor Profile:

- Under Vendor Profiles, Click on Edit.
- Select the Vendor you would like to edit.
- Correct the selected Vendor's Information.
- Save Changes.

See next page....



To Add a New Shipping Profile:

You will create a Shipping Profile for anyone you will have items shipped to: drapery workrooms, furniture receivers, upholstery workrooms, etc.

Continued on next page...

To Add a New Shipping Profile:

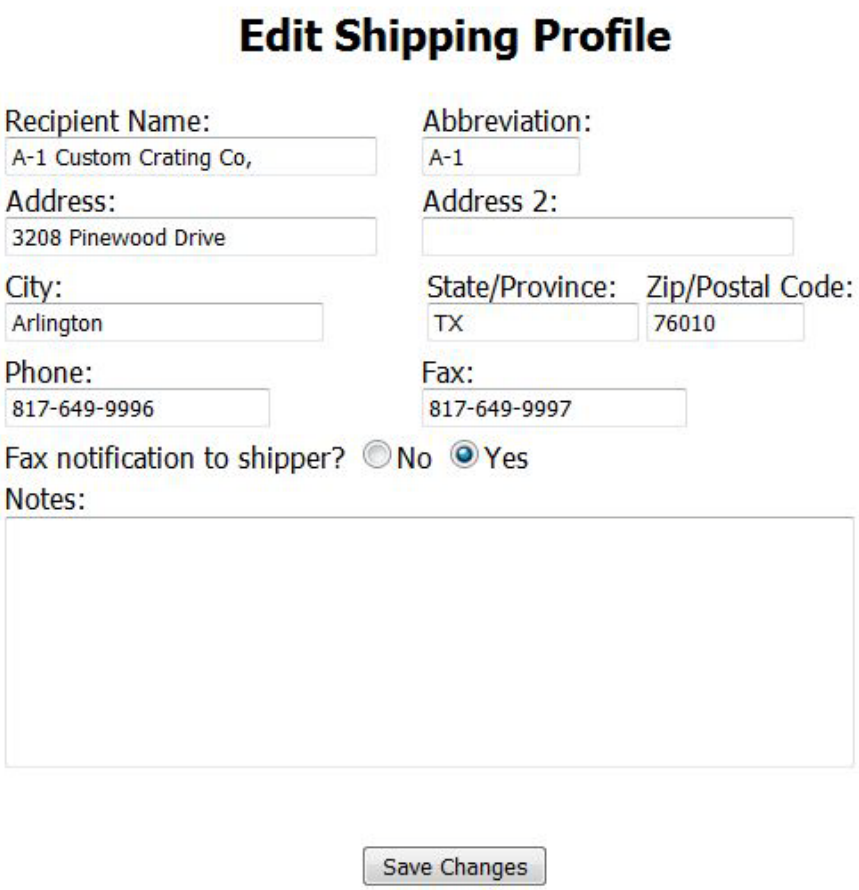
- Go to the Settings Menu (See page 6)

- Under Shipping Profiles, Click on Add.

- Fill out the New Shipping Profile.
    - Recipient Name - The name of the person or company you will be shipping an item to.
    - Abbreviation - Up to 10 characters, something you will be able to identify that company by, i.e. Howard Elliott could be H Elliott or Howard Ell
    - Address - The address you want to ship to.
    - Phone - The recipient's phone number.
    - Fax - The recipient's fax number.
    - Fax Notification to Shipper? - Usually you will choose YES, this tells the CMS to create a page which you will fax to this receiver each time something you ordered will be shipped to them.

- Save Changes.

NOTE: MAKE SURE TO CLICK YES ON FAX NOTIFICATION TO SHIPPER? (above notes) IF THE ORDER WILL BE SHIPPING TO SOMEONE OTHER THAN YOURSELF, SO THAT THEY KNOW TO EXPECT IT AND CAN MATCH THE ITEM TO THE PROPER P.O. NUMBER WHEN THEY RECEIVE IT.



To Edit a Shipping Profile:

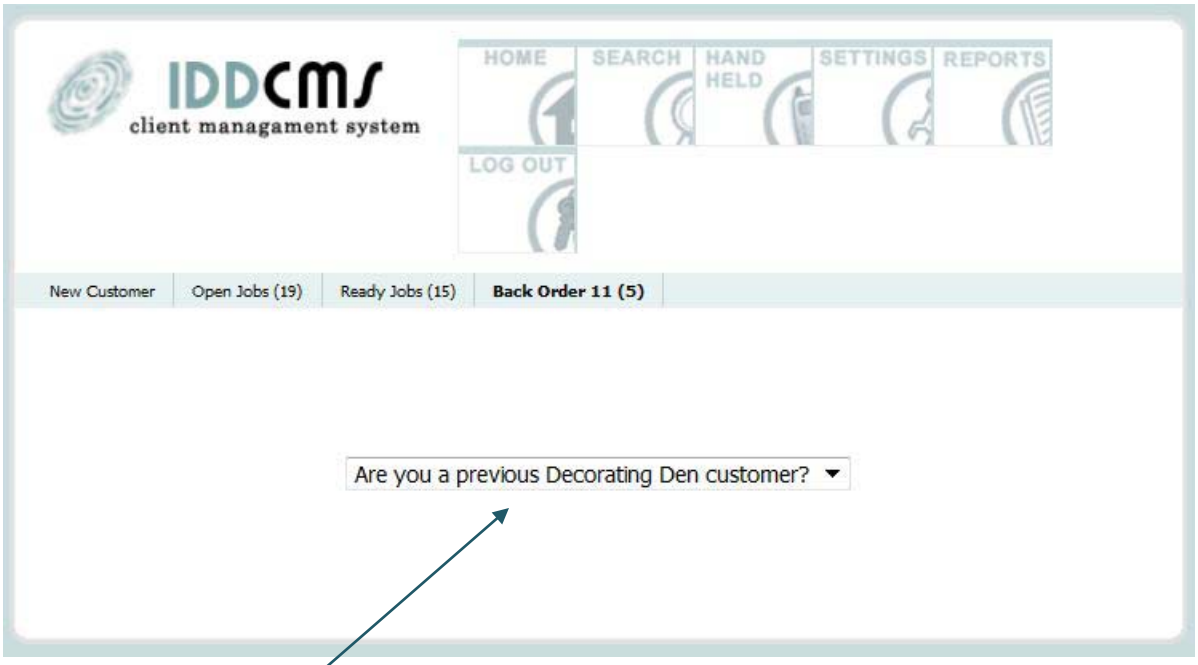
- Under Shipping Profiles, Click on Edit.
- Select the Shipping Profile you would like to edit.
- Correct the selected Profile's Information.
- Save Changes.

Adding

NEW CUSTOMERS & JOBS

To Add a New Customer:

- Click on New Customer



- Click inside the box.
- You will be given a drop down menu with the options: Yes & No.
- Click on the appropriate answer. If the customer has not been entered into the CMS, choose No.

IF YOU CHOOSE YES:
You will be taken to this search box where you can search for the existing customer's Customer Profile by Last Name.

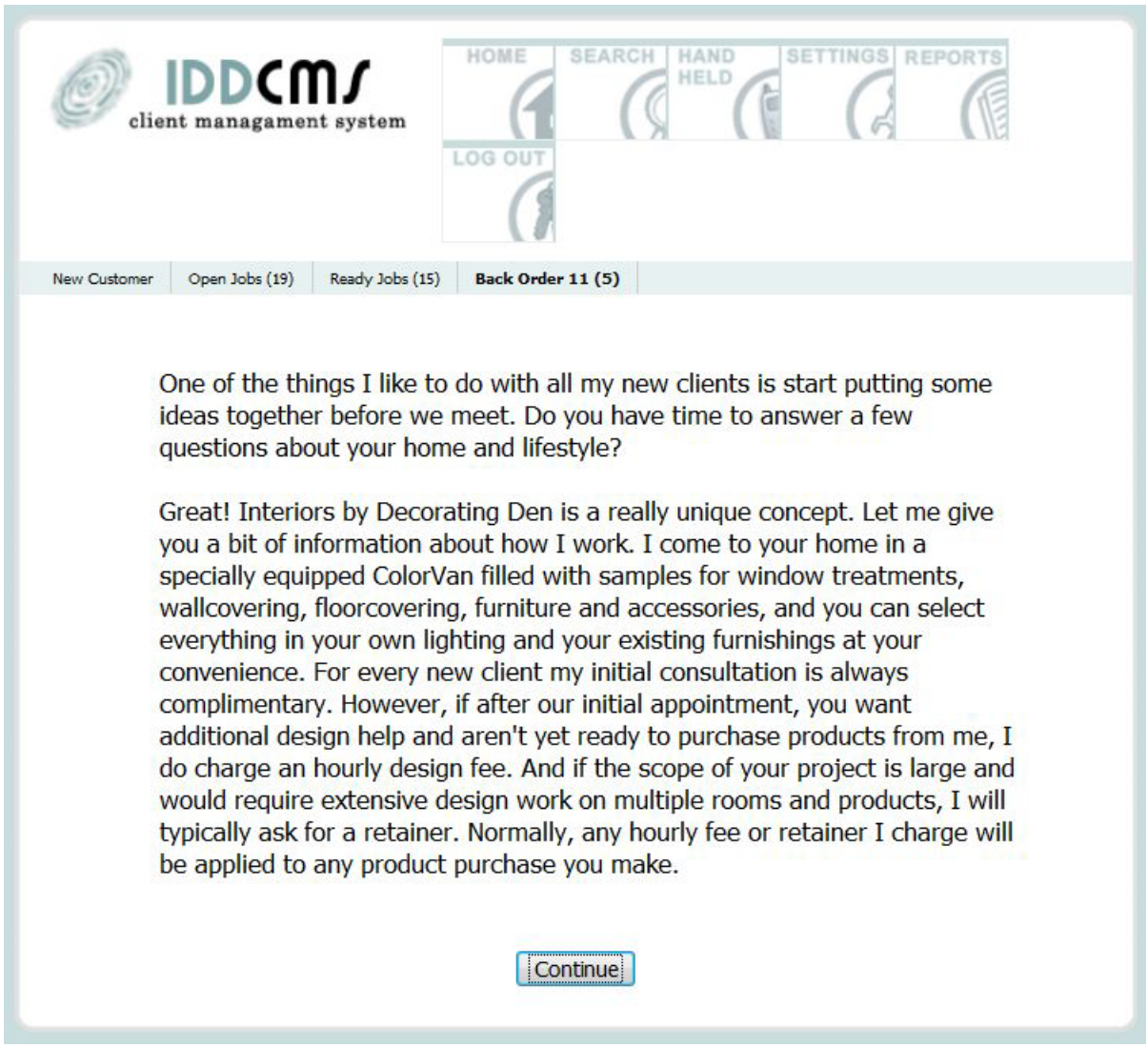
IF YOU CHOOSE NO:
You will be taken to the DDI Phone Interview where you will start entering the customer's information.

- Fill out as much information as you can on this form. You can leave fields blank if necessary.
- Click Add Customer when complete.

NOTE: MAKE SURE THAT YOU TYPE EVERYTHING ON THIS PAGE WITH THE CORRECT CAPITALIZATION, PUNCTUATION AND ABBREVIATIONS - YOU WILL LATER BE ABLE TO USE THIS INFORMATION TO EXPORT TO A MICROSOFT MAIL MERGE TO PRINT MAILING LABELS.

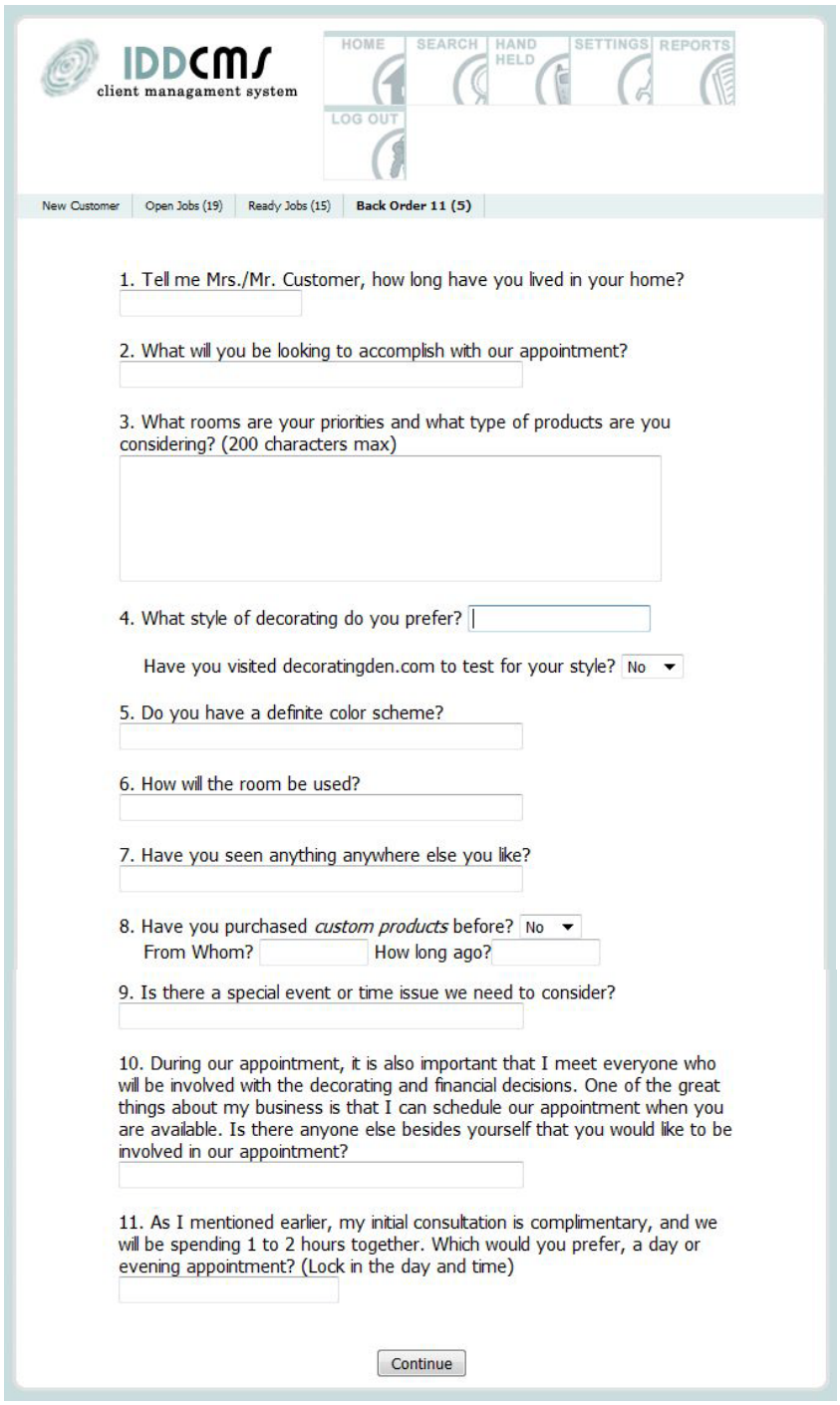
- This is the first question of the DDI Phone Interview page.
- Choose an option and click Continue

NOTE: IT IS VERY IMPORTANT THAT YOU AT LEAST ANSWER THIS QUESTION WHEN ENTERING YOUR NEW CUSTOMER INTO THE CMS. IF YOU DO, THE CMS CAN HELP YOU TO TRACK THE EFFECTIVENESS OF YOUR ADVERTISING DOLLAR.


IDDCMS
client managament system
HOME
SEARCH
HAND HELD
SETTINGS
REPORTS
LOG OUT
New Customer
Open Jobs (19)
Ready Jobs (15)
Back Order 11 (5)
One of the things I like to do with all my new clients is start putting some ideas together before we meet. Do you have time to answer a few questions about your home and lifestyle?
Great! Interiors by Decorating Den is a really unique concept. Let me give you a bit of information about how I work. I come to your home in a specially equipped ColorVan filled with samples for window treatments, wallcovering, floorcovering, furniture and accessories, and you can select everything in your own lighting and your existing furnishings at your convenience. For every new client my initial consultation is always complimentary. However, if after our initial appointment, you want additional design help and aren't yet ready to purchase products from me, I do charge an hourly design fee. And if the scope of your project is large and would require extensive design work on multiple rooms and products, I will typically ask for a retainer. Normally, any hourly fee or retainer I charge will be applied to any product purchase you make.
Continue

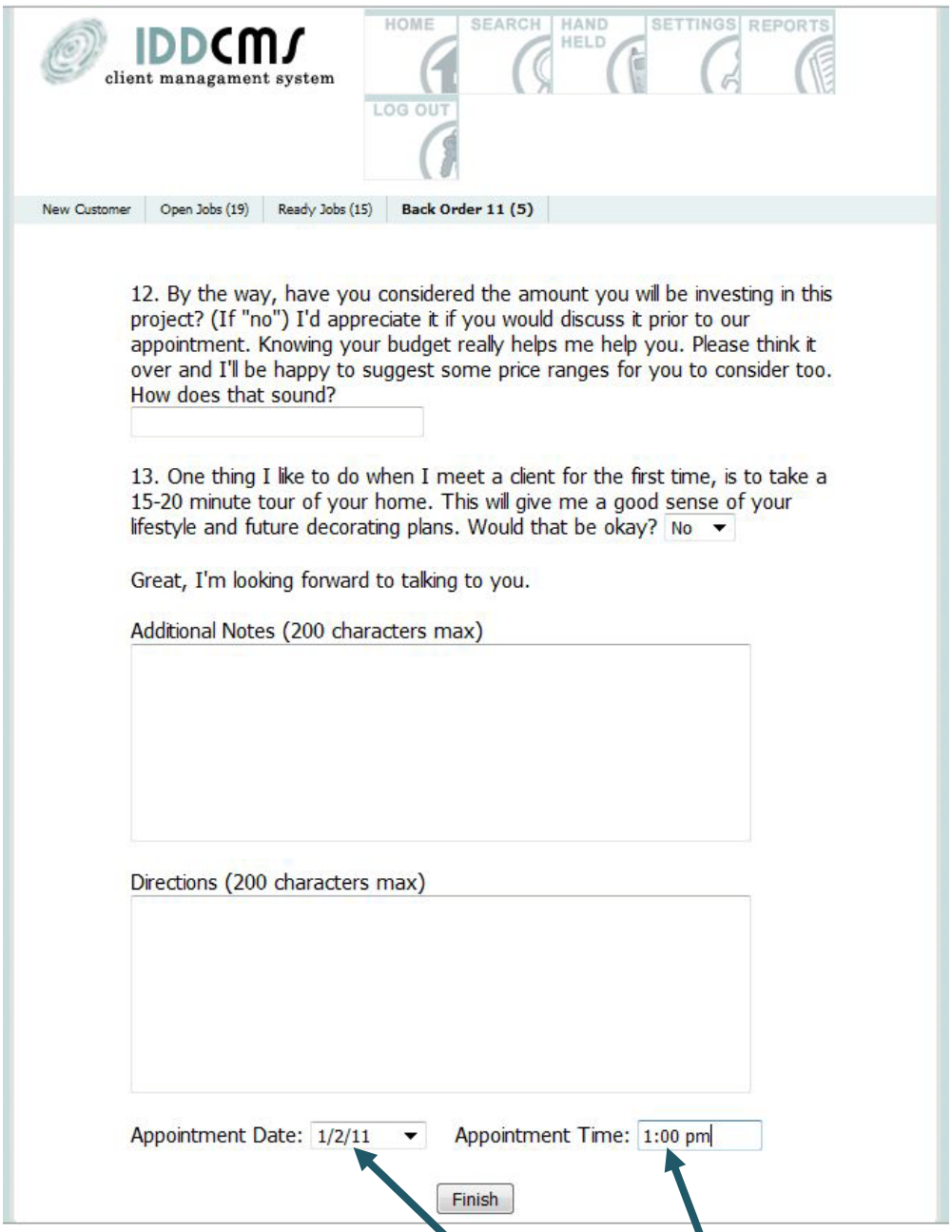
This is the DDI Phone Interview. You may choose to use the CMS to conduct your phone interviews.

- **If you are using the CMS to conduct your phone interviews:**
    - You may read directly from the screen during the call, then click Continue.
- **If you are not using the CMS to conduct your phone interviews:**
    - Click Continue.


IDDCMS
client managament system
HOME
SEARCH
HAND HELD
SETTINGS
REPORTS
LOG OUT
New Customer
Open Jobs (19)
Ready Jobs (15)
Back Order 11 (5)
1. Tell me Mrs./Mr. Customer, how long have you lived in your home?
2. What will you be looking to accomplish with our appointment?
3. What rooms are your priorities and what type of products are you considering? (200 characters max)
4. What style of decorating do you prefer?
Have you visited decoratingden.com to test for your style? No
5. Do you have a definite color scheme?
6. How will the room be used?
7. Have you seen anything anywhere else you like?
8. Have you purchased custom products before? No
From Whom?
How long ago?
9. Is there a special event or time issue we need to consider?
10. During our appointment, it is also important that I meet everyone who will be involved with the decorating and financial decisions. One of the great things about my business is that I can schedule our appointment when you are available. Is there anyone else besides yourself that you would like to be involved in our appointment?
11. As I mentioned earlier, my initial consultation is complimentary, and we will be spending 1 to 2 hours together. Which would you prefer, a day or evening appointment? (Lock in the day and time)
Continue

- **If you are using the CMS to conduct your phone interviews:**
  - Complete the boxes in the above form and click Continue.

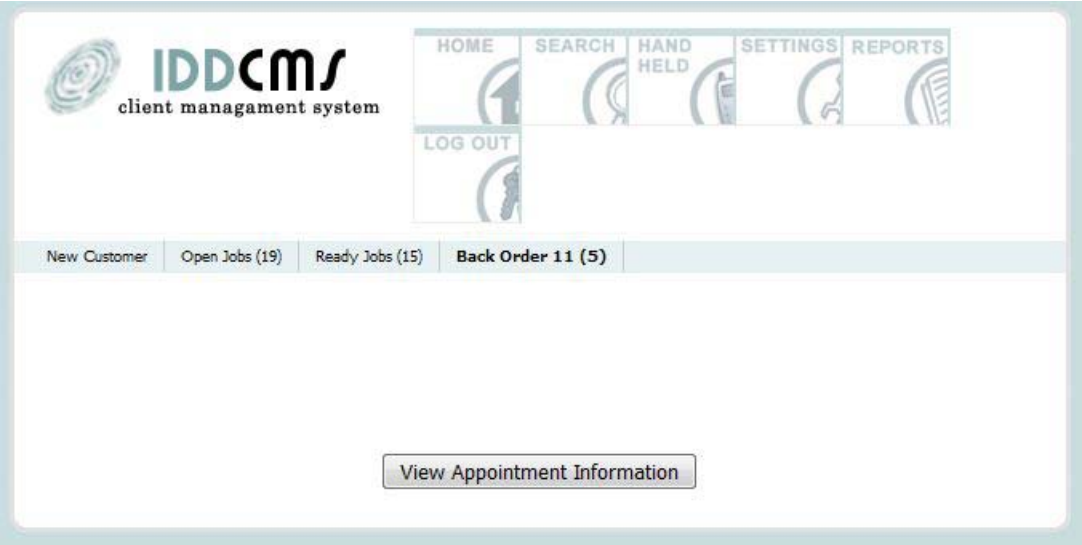
- **If you are not using the CMS to conduct your phone interviews:**
  - Click Continue.


IDDCMS
client managament system
HOME
SEARCH
HAND HELD
SETTINGS
REPORTS
LOG OUT
New Customer
Open Jobs (19)
Ready Jobs (15)
Back Order 11 (5)
12. By the way, have you considered the amount you will be investing in this project? (If "no") I'd appreciate it if you would discuss it prior to our appointment. Knowing your budget really helps me help you. Please think it over and I'll be happy to suggest some price ranges for you to consider too. How does that sound?
13. One thing I like to do when I meet a client for the first time, is to take a 15-20 minute tour of your home. This will give me a good sense of your lifestyle and future decorating plans. Would that be okay? No
Great, I'm looking forward to talking to you.
Additional Notes (200 characters max)
Directions (200 characters max)
Appointment Date: 1/2/11
Appointment Time: 1:00 pm
Finish

- **If you are using the CMS to conduct your phone interviews:**
  - Complete the boxes in the above form and click Finish.
  - Directions: this box is for unique notes that the customer may pass along to you (cross-streets, time, etc.) You will be given the opportunity later, to access Google maps and print actual driving directions.

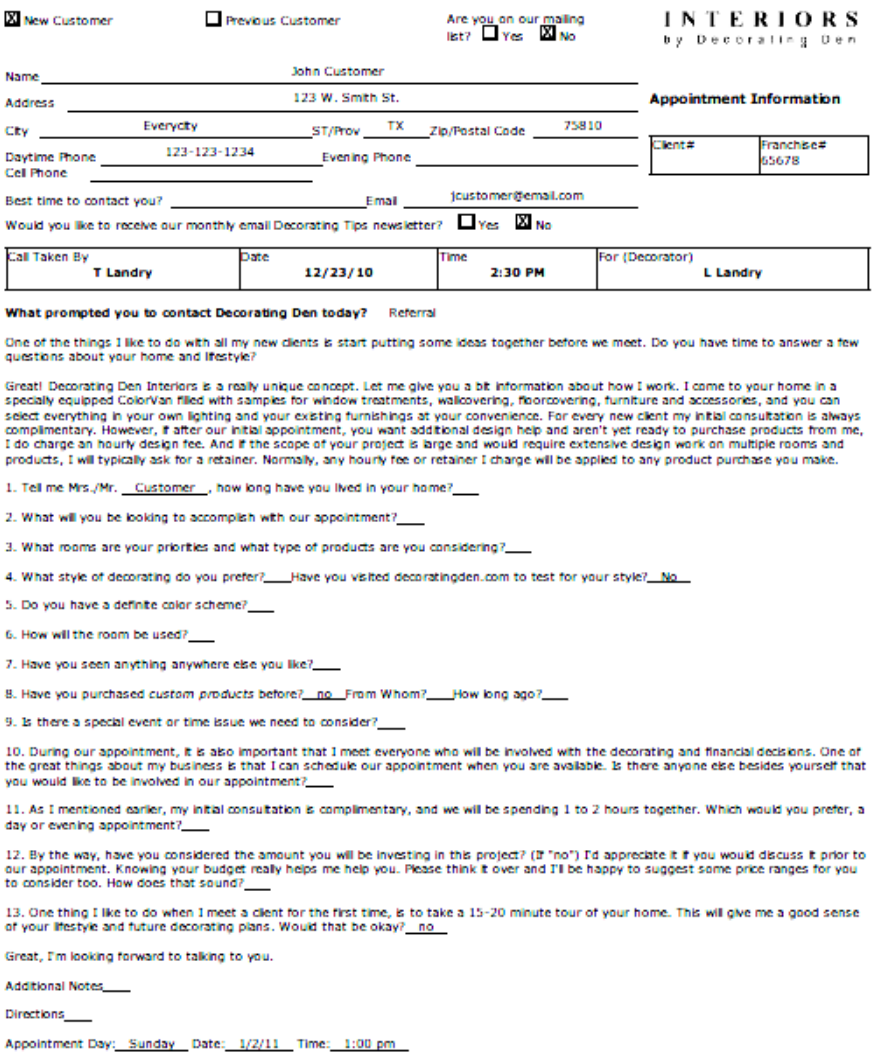
- **If you are not using the CMS to conduct your phone interviews:**
  - Select the Appointment Date and Appointment Time that you set up with the customer and click Finish.

NOTE: THE INFORMATION FROM THE APPOINTMENT DATE AND TIME BOXES WILL AUTOMATICALLY BE ADDED TO YOUR CALENDAR ON THE CMS HOME PAGE.



- Clicking Finish takes you to this screen.

- To view the data you just entered, click View appointment Information, a new tab will open with the Appointment Information Form.



☒ New Customer ☐ Previous Customer Are you on our mailing list? ☐ Yes ☒ No

INTERIORS by Decorating Den

Name John Customer

Address 123 W. Smith St.

City Everycity ST/Prov TX Zip/Postal Code 75810

Daytime Phone 123-123-1234 Evening Phone

Cell Phone

Best time to contact you? Email jcustomer@email.com

Would you like to receive our monthly email Decorating Tips newsletter? ☐ Yes ☒ No

Appointment Information

Client#	Franchise#
	65678

Call Taken By	Date	Time	For (Decorator)
T Landry	**12/23/10**	**2:30 PM**	**L Landry**

What prompted you to contact Decorating Den today? Referral

One of the things I like to do with all my new clients is start putting some ideas together before we meet. Do you have time to answer a few questions about your home and lifestyle?

Great! Decorating Den Interiors is a really unique concept. Let me give you a bit information about how I work. I come to your home in a specially equipped ColorVan filled with samples for window treatments, wallcovering, floorcovering, furniture and accessories, and you can select everything in your own lighting and your existing furnishings at your convenience. For every new client my initial consultation is always complimentary. However, if after our initial appointment, you want additional design help and aren't yet ready to purchase products from me, I do charge an hourly design fee. And if the scope of your project is large and would require extensive design work on multiple rooms and products, I will typically ask for a retainer. Normally, any hourly fee or retainer I charge will be applied to any product purchase you make.

1. Tell me Mrs./Mr. Customer, how long have you lived in your home?___

2. What will you be looking to accomplish with our appointment?___

3. What rooms are your priorities and what type of products are you considering?___

4. What style of decorating do you prefer?___Have you visited decoratingden.com to test for your style? No

5. Do you have a definite color scheme?___

6. How will the room be used?___

7. Have you seen anything anywhere else you like?___

8. Have you purchased *custom products* before? no From Whom?___How long ago?___

9. Is there a special event or time issue we need to consider?___

10. During our appointment, it is also important that I meet everyone who will be involved with the decorating and financial decisions. One of the great things about my business is that I can schedule our appointment when you are available. Is there anyone else besides yourself that you would like to be involved in our appointment?___

11. As I mentioned earlier, my initial consultation is complimentary, and we will be spending 1 to 2 hours together. Which would you prefer, a day or evening appointment?___

12. By the way, have you considered the amount you will be investing in this project? (If "no") I'd appreciate it if you would discuss it prior to our appointment. Knowing your budget really helps me help you. Please think it over and I'll be happy to suggest some price ranges for you to consider too. How does that sound?___

13. One thing I like to do when I meet a client for the first time, is to take a 15-20 minute tour of your home. This will give me a good sense of your lifestyle and future decorating plans. Would that be okay? no

Great, I'm looking forward to talking to you.

Additional Notes___

Directions___

Appointment Day: Sunday Date: 1/2/11 Time: 1:00 pm

If you conduct you phone interviews using the CMS, we recommend that you print a copy for your customer's file at the completion of entering any new customer into the CMS.

- The Appointment Information Form you are taken to should look similar to the image above.
- READ THROUGH THE FORM CAREFULLY TO ENSURE THAT EVERYTHING, ESPECIALLY THE APPOINTMENT DATE AND TIME, ARE RECORDED CORRECTLY.
- **If all of this information is correct, you have successfully added your new customer to the CMS database! In the future, for each new job for this customer you will merely follow the instruction on page 32-40.**

- To make any changes to Customer information or appointment time, go to the customer's Customer Profile (see Searching the CMS on page 30-32) and click Edit Profile.

NOTE: A link to Google Maps Driving Directions to the customer's home (which you can print out for your customer's file) is available in the Customer's Profile. To view the Customer's Profile see Searching the CMS on page 30-32.

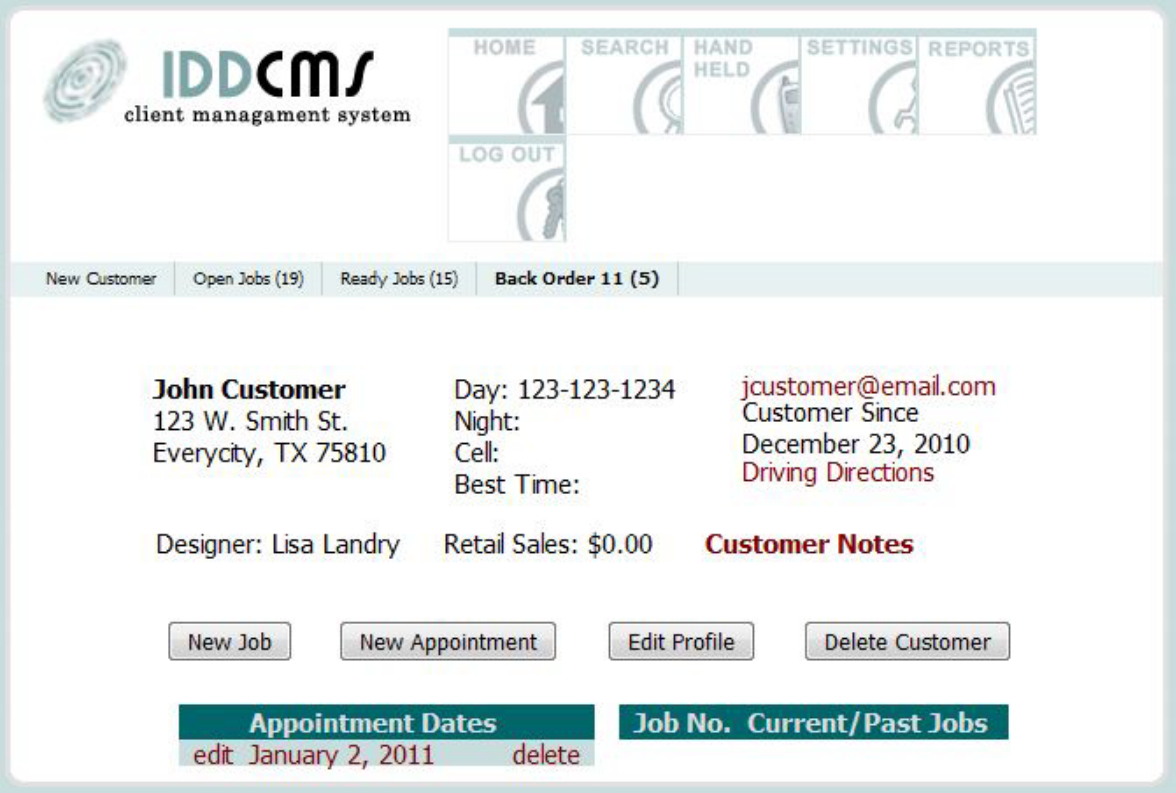
Searching the CMS:

- Click on Search

- You can search the CMS by:
  - First Name
  - Last Name
  - Address
  - Phone Number
  - Email Address
  - Job Number - P.O. Number
  - Item Number - Vendor SKU or Style #

- To Search, type your query into the Search Box and click Find Customer.

- When the results come up choose your customer from the list. This will take you to that customer's "Customer Profile," pictured below.



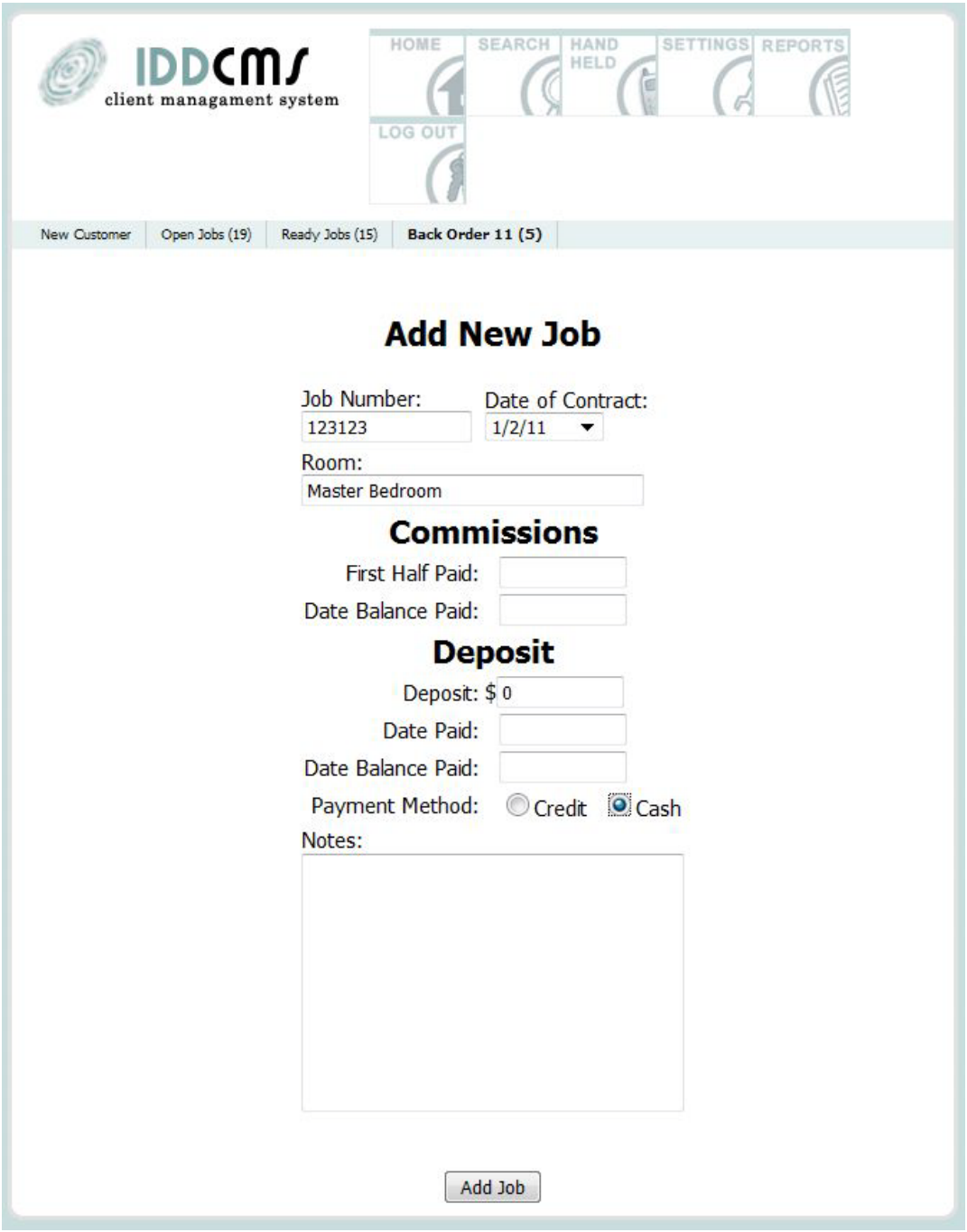
- Here you can see all of this customer's past and current jobs, any pending appointments, the customer's total sales and a link to Google driving directions to the customer's home.

- You can change information in this profile by clicking Edit Profile. You can change the date and time of the customer's appointment by clicking Edit (to the left of the customer's appointment listing).

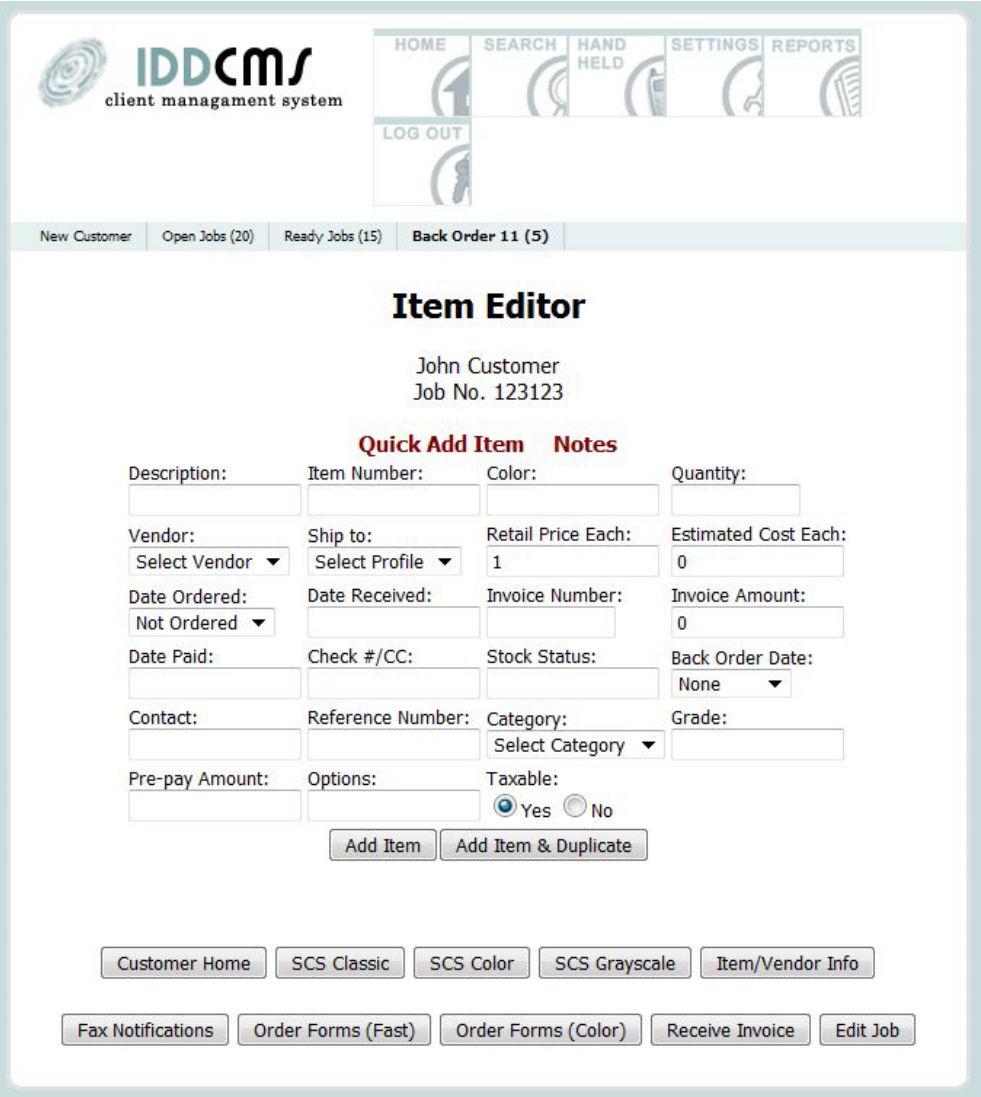
To Add a New Job for a Customer already in the CMS:

- Go to the Customer's Profile (p 29-31)
- Click New Job

- If there is an existing appointment, assign the new job to that appointment.
- If not, select the Date of Sale for this job in the drop down box and click Set This Date.



- When you add a job you will fill out (initially):
  - Job Number - **Same as P.O. Number from the Sales Agreement**
  - Date of Contract - Date from the Sales Agreement
  - Room - In this line you can be pretty descriptive, which is useful if your client is decorating their room in stages. (i.e. Master Bedroom could also be Master Bedroom Bedding and Window Treatments OR Master Bedroom Rug and Consulting)
  - Payment Method
- The rest of the boxes will be filled out as payments are processed and profit percentages are determined (See p 53-60).
- Click Add Job.



ITEM EDITOR:

You will use the Item Editor to add each item you sell, including labor, installation, and freight if you are going to receive a separate invoice for freight.

- When entering an item fill out as many as necessary, to make a clear order form.

    - **Description** - This box has space to thoroughly describe the item. Include the Item Name here.
        - The goal is:
            A. To give detailed information to the Vendor about the item (style name, etc.)
            B. To aid the person, who checks the item in when received, in determining if the item they have is what you intended to order.
            This will catch any errors in shipping/packaging from the supplier and any errors in your ordering (i.e. if you accidentally transposed two numbers in the item number.

ITEM EDITOR CONTINUED ON PAGES 35-36.

- Item Number - OR Item Name - Can include both numbers and letters
- Color - This is where you enter item color or Finish Color for furniture orders
- Quantity - You must enter a quantity.
- Vendor - Choose from the Vendors (you entered previously) in the drop down menu
  - If the Vendor (etc.) you need is not there, see Adding a Vendor Profile (p 11)
- Ship to - Choose from the Shipping Profiles (you entered previously) in the drop down menu
  - If the Vendor (etc.) you need is not there, see Adding a Shipping Profile (p 15-17)
- Retail Price Each - Enter the retail price you charged for this item.
- Estimated Cost Each - This is the wholesale cost you anticipated when making the sale.
- Date Ordered - The date you will fax, phone in, or email your orders to the manufacturer (at least 3 business days from the Date of Sale).
- Date Received- See Checking in Received Items (p 41-44)
- Invoice Number - See Processing Payments and Invoices (p 53-60)
- Invoice Amount - See Processing Payments and Invoices (p 53-60)
- Date Paid - See Processing Payments and Invoices (p 53-60)
- Check#/CC- See Processing Payments and Invoices (p 53-60)
- Stock Status - Fill this in if you called to check availability of stock from the vendor (i.e. Available, Discontinued-2 available, etc.)
- Back Order Date - If the item is back ordered select the back order date; this will add the item to the Back Order list (see p 51-52).
- Contact - Who you spoke to when confirming availability with the Vendor
- Reference Number - Vendor assigns this after order is placed
- Category - Important for reporting your sales to DecoNet.
  Your Options will be:
  - Soft Window - Window Treatments, including Draperies, Cornices, Valances, and the Hardware, Labor and Installation Costs of Each etc.
  - Hard Window - Blinds, Woven Wood Shades, and the Installation costs, etc.
  - Bedcovering - Bedding of all sorts, Labor (for Custom Bedding)
  - Floor Covering - Rugs, Tile, Carpet, etc.
  - Wall Covering - Wallpapers
  - Upholstered Furniture - Anything Upholstered (i.e. Sofas, Upholstered Chairs, Ottomans, any associated Labor costs, etc.)
  - Case Goods - Any furniture not upholstered (i.e. Dressers, Entertainment Consoles, Buffets, etc.)
  - Lighting - All Lamps and Installed Lighting Fixtures including: Chandeliers, Sconces, Floor Lamps, Table Lamps, etc.
  - Accessories - Art, Floral Arrangements, Vases, Framing, etc.
  - Other - Services, Referral Fees, Paint Selection, Consulting, etc.
- Grade - If vendor has assigned a grade to this particular item.
- Pre Pay Amount - Only complete this if you have pre-paid the vendor for this item.

- Options - This box is for adding additional options you may be adding to your item (trim, upgraded cushioning, etc.) The space in this box is very limited (30 characters), include additional details in the Description box if necessary.
- Taxable - Services, generally, are not taxable, but check with your state to be sure.

NOTE: Items in red must be filled in, in order to navigate to the next page.

- Click Add Item

- ADD **EACH** ITEM ON THE SALES AGREEMENT BY FOLLOWING THESE STEPS.

- Once finished, you will check the total from your Sales Agreement against the total on the CMS' Sales/Cost of Sales to be sure that the totals match (see next page.)

ABOUT: Add Item & Duplicate
If you are adding two nearly identical items, such as two Faux Wood Blinds with slightly different dimensions, you could click Add Item & Duplicate. This will add the current item to the job but keep all of the information you have input in the boxes. To add the second item all you will need to do is make whatever small changes are necessary and click Add Item.

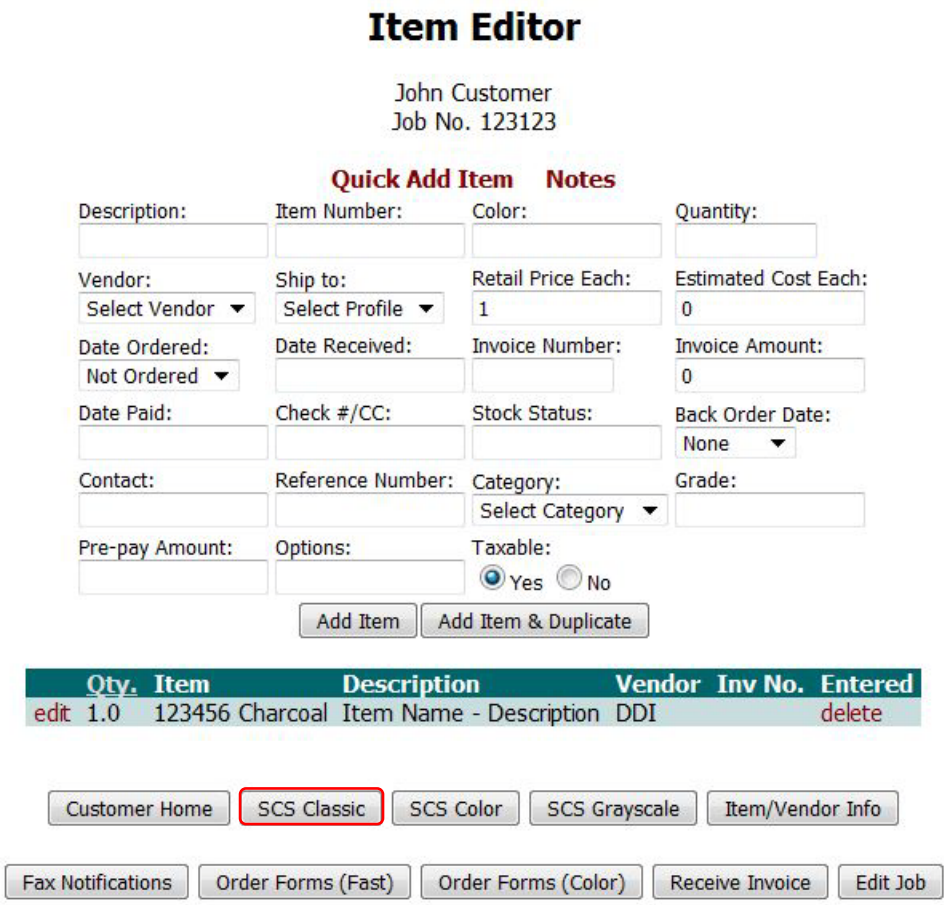
To Add a Coupon in the Item Editor:

- In Description, enter: "Coupon (Source)" - Enter the actual source of the coupon in place of (Source), i.e. (Constant Contact), (Direct Mailer), (Newspaper), etc.
- Quantity = 1
- In Vendor, choose DDI.
- In the Retail Price, enter -###.## For example: a $50 coupon would be entered as: -50.00
- In Estimated Cost, enter: 00.00
- Date Ordered and Date Received enter: the Date of Sale
- Category, choose Other.
- Click Add Item

NEGATIVE AMOUNTS WILL BE DISPLAYED ON YOUR SALES/COST OF SALES AS SUCH:

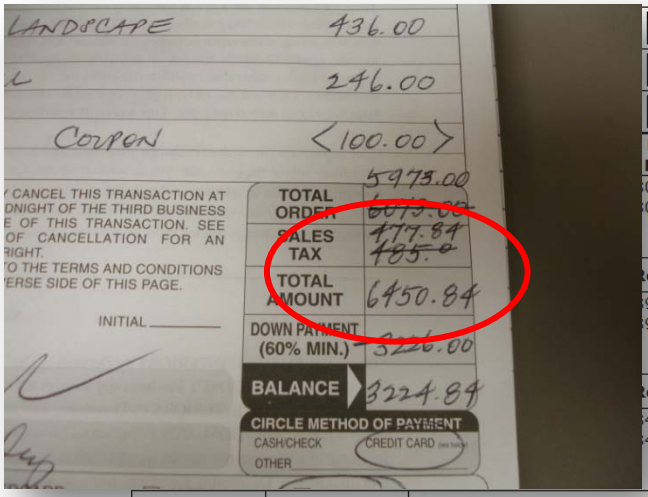
-$50.00 = <50.00>

Check Sales Agreement & Sales/Cost Of Sales for matching totals:



Check Sales Agreement & Sales/Cost Of Sales for matching totals (cont.):

If the totals do not match, go through each line item checking for what you might have missed/ entered incorrectly.



Print This Page

Sales/Cost of Sales Page 1 of 1

Business Phone:	Date of Contract:	Decorator:
817-261-9032	12/1/10	Lisa Landry

Room: Breakfast Nook/Powder Bath

		Retail Price	Est. Cost	Date Ordered	Date Rec'd.	Inv. No	Inv. Amt.	Date Pd.
		0.00	$0.00	12/3/10	12/8/10	1134	61.77	
		0.00	$0.00					
		Ref#:		Stock Status:				
		90.00	$39.95	12/3/10	12/21/10	1134	0.0	
		90.00	$39.95					
		Ref#:		Stock Status:				
		496.00	$159.00	12/3/10			0.0	
		496.00	$159.00					
		Contact:		Ref#:		Stock Status:	Pre-pay - 16130 -	
Espresso Starburst: Black Starburst Mirror	8757	1.0	Paragon DDI	$837.00 $837.00	$279.00 $279.00	12/3/10		0.0
		Contact:		Ref#:		Stock Status:		
Twist 60": Twisted Lamp-Black w/ Brown Shade	28513-1	1.0	Utter DDI	$368.00 $368.00	$99.00 $99.00	12/3/10	12/21/10 5619	188.11
		Contact:		Ref#:		Stock Status:		
Vercelli 35": Blue Ceramic Lamp	26790	1.0	Utter DDI	$226.00 $226.00	$69.00 $69.00	12/3/10	12/21/10 5619	0.0
		Contact:		Ref#:		Stock Status:		

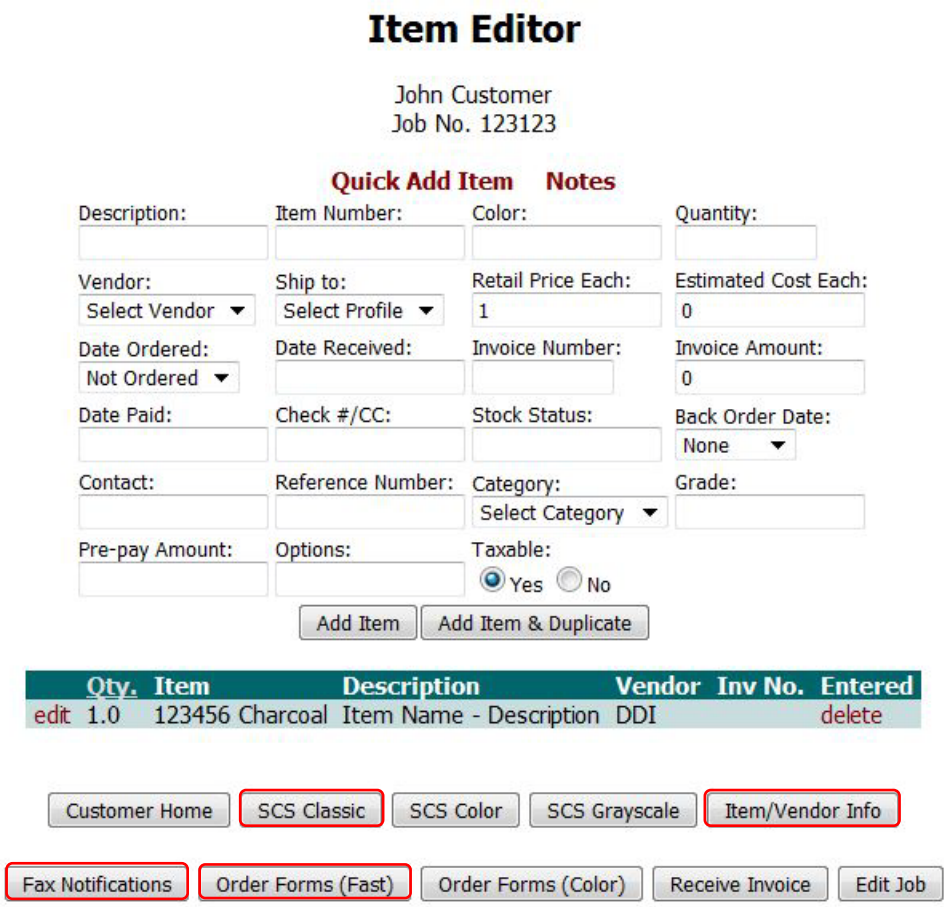
Notes

Retail	Estimated	Actual
Retail	$2,017.00	$2,017.00
Total Cost	$706.46	$310.39
Gross Profit	$1,310.54	$1,706.61
Gross Profit %	64.97%	84.61%
Commissions	$0.00	$0.00
1st Half $0 Date Pd.		

Retail Totals	$2,017.00
Sales Tax	$161.36
Total Charges	$2,178.36
Deposit	$1,090.00
Date Paid	12-1-10
Balance	$1,088.36
Date Paid	

NOTE: THE TOTALS FROM THESE TWO PLACES MUST MATCH!!! DO NOT MOVE ON FROM THIS STEP UNTIL THE TWO TOTALS MATCH.

Print S/COS, Order Forms (Fast), Fax Notifications, Item/Vendor Info:



- Select each of these buttons. A new browser tab will open for each one, from which you may print these pages for your customer's file.
    - The Sales/Cost Of Sales shows an itemized list of each item's information from the Item Editor and Total Sales and Costs and Profit Margins.
    - The "Order Forms (Fast)" option creates a black and white copy of the order forms, saving ink and helping to ensure a clear fax. If you are ordering by fax, you will fax these sheets to the vendors.
    - The Item/Vendor Info page can be used as a quick reference copy for the status of each Job(P.O.) Merely check the box of each item as it is received and checked in on the CMS, then you can see at a glance what items you are waiting to receive.
    - The Order Forms and Fax Notifications will have the fax number of the vendor (from the Vendor Profile) printed at center-top, as shown on the next page.

- To Print:
    - Press Ctrl-P
    - Choose your Printer
    - Click Print

SAMPLE: ORDER FORMS (FAST)

INTERIORS by Decorating Den
FURNITURE AND ACCESSORY ORDER FORM

Order Date: 1/3/11
Franchise Owner:
Decorating Den Interiors
1205 Sturgeon Ct
Suite 105
Arlington, TX 76001
Phone: 817-472-0067
Fax: 817-557-6909

Account #: [redacted]
Manufacturer: Uttermost Co
Address: 3325 Grassy Hill Rd P.O 558
City: Rocky Mount , VA 24151
Phone: 1-800-678-5486
Fax: 1-877-376-6777

Bill Freight to:
Decorating Den Interiors
1205 Sturgeon Ct
Suite 105
Arlington, TX 76001

Ship to: Decorating Den Interiors
Address: 1205 Sturgeon Ct.
Suite # 105
City: Arlington, TX 76001
Phone: 817-472-0067
Fax: 817-557-6909

Customer PO #:
695023-LL/DB
Sidemark: Ledbetter

Notify Receiver: (YES)_X_
(NO)_____

QTY	ITEM#	DESCRIPTION	FINISH/FABRIC	GRADE	OPTIONS	COST	TOTAL
1	28513-1	Twist 60": Twisted Lamp-Black w/ Brown Shade				99	99
1	26790	Vercelli 35": Blue Ceramic Lamp				69	69

Special Instructions: PLEASE SEND A CONFIRMATION UPON RECEIVING THIS ORDER.

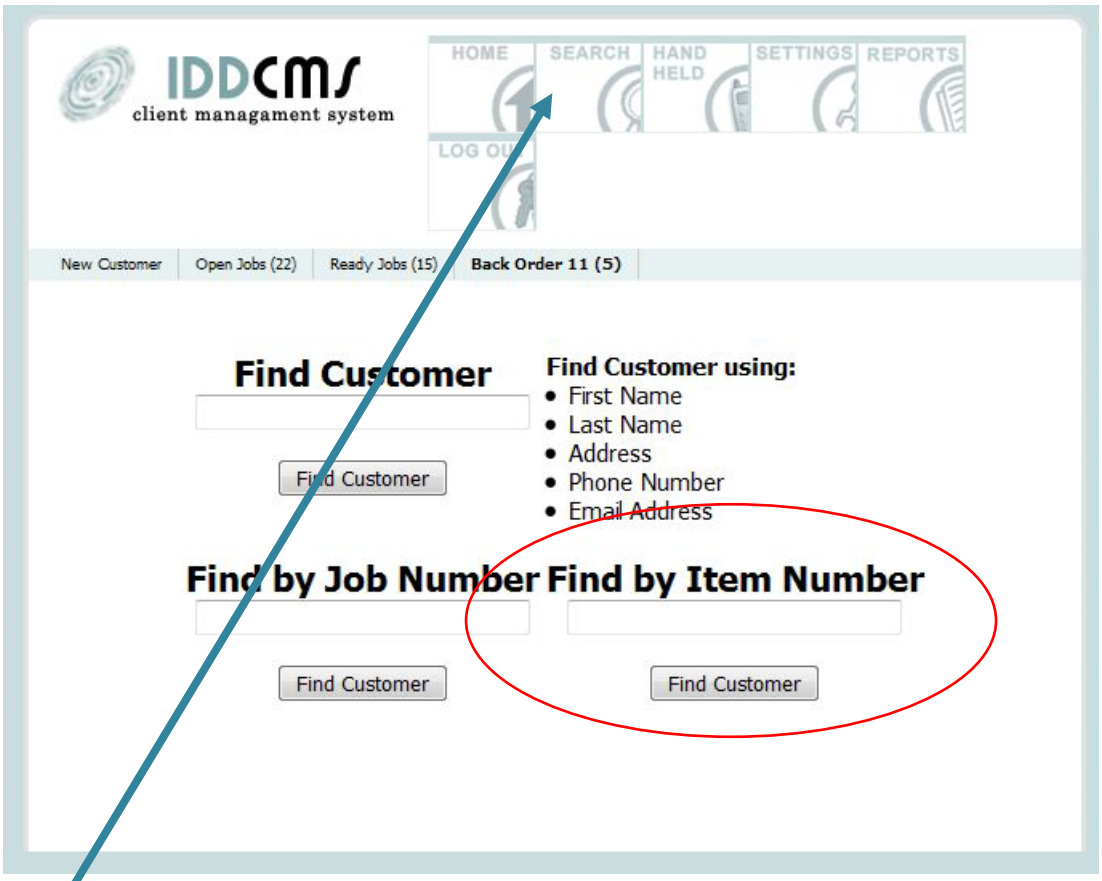
Check # _____ Check Amount _____

Total $ 168.00

Contact_____

Checking in

RECEIVED ITEMS

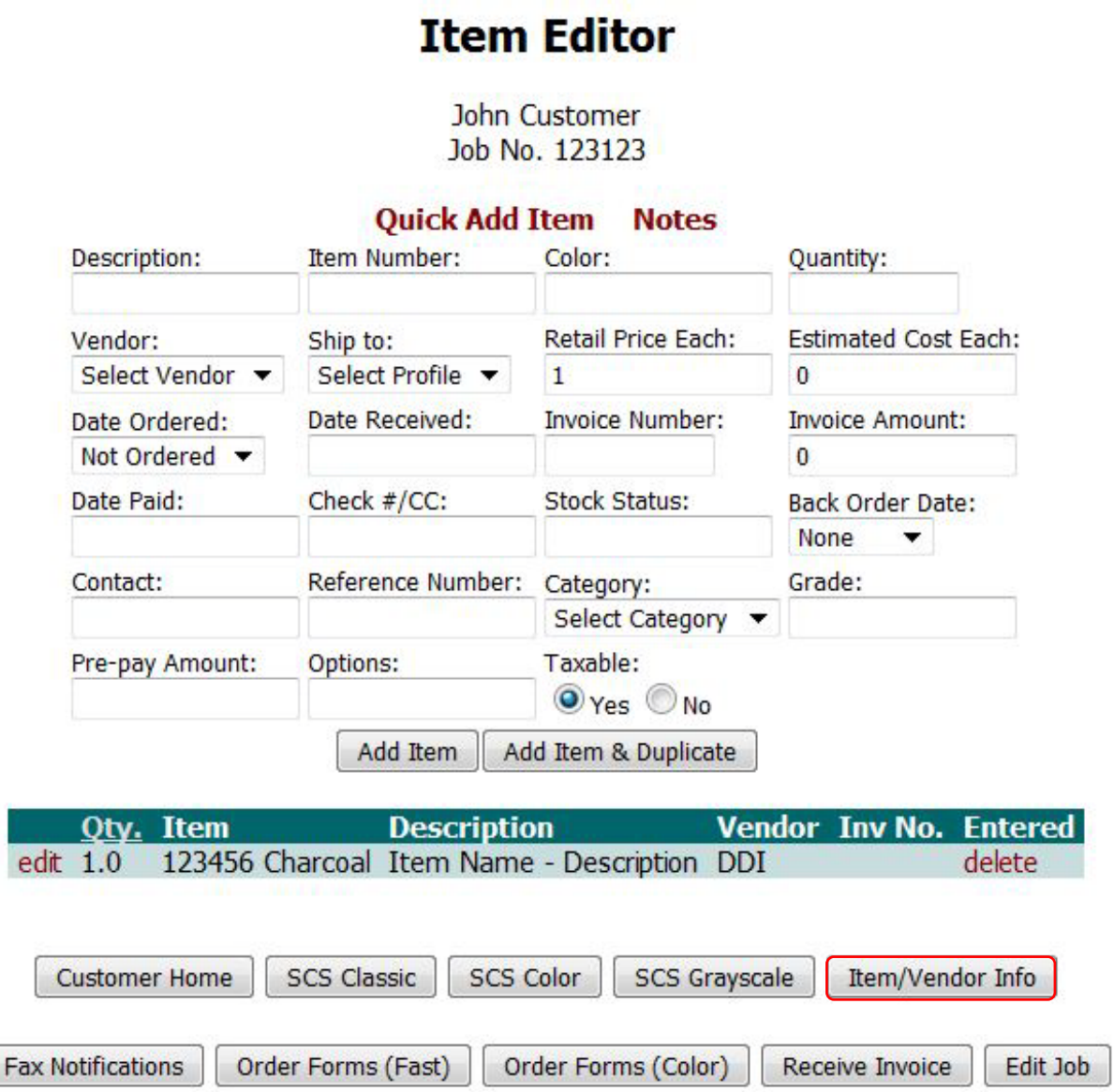


To Check in an Item:

- Click on the Search Menu (at the top of the screen on the Home page)

- Type the Item Number into the Find by Item Numbers box and click Find Customer.
  OR
- Type the order Sidemark into the Find Customer search box and click Find Customer.

- The Search Results will be displayed (example below). Select the correct customer (there may be numerous results if more the one customer ordered the same item.)



- You will be taken to the Item Editor page for that job. Select the Item/Vendor Info button.

- By selecting the Item/Vendor Info button you can see an up-to-date status report of the items in this job and see which items have not been received.

- As you receive each item check the Rec'd box for that item, to the right of that item, and then click Mark Received. When the last item is checked in your job will move from the Open tab to the Ready tab.

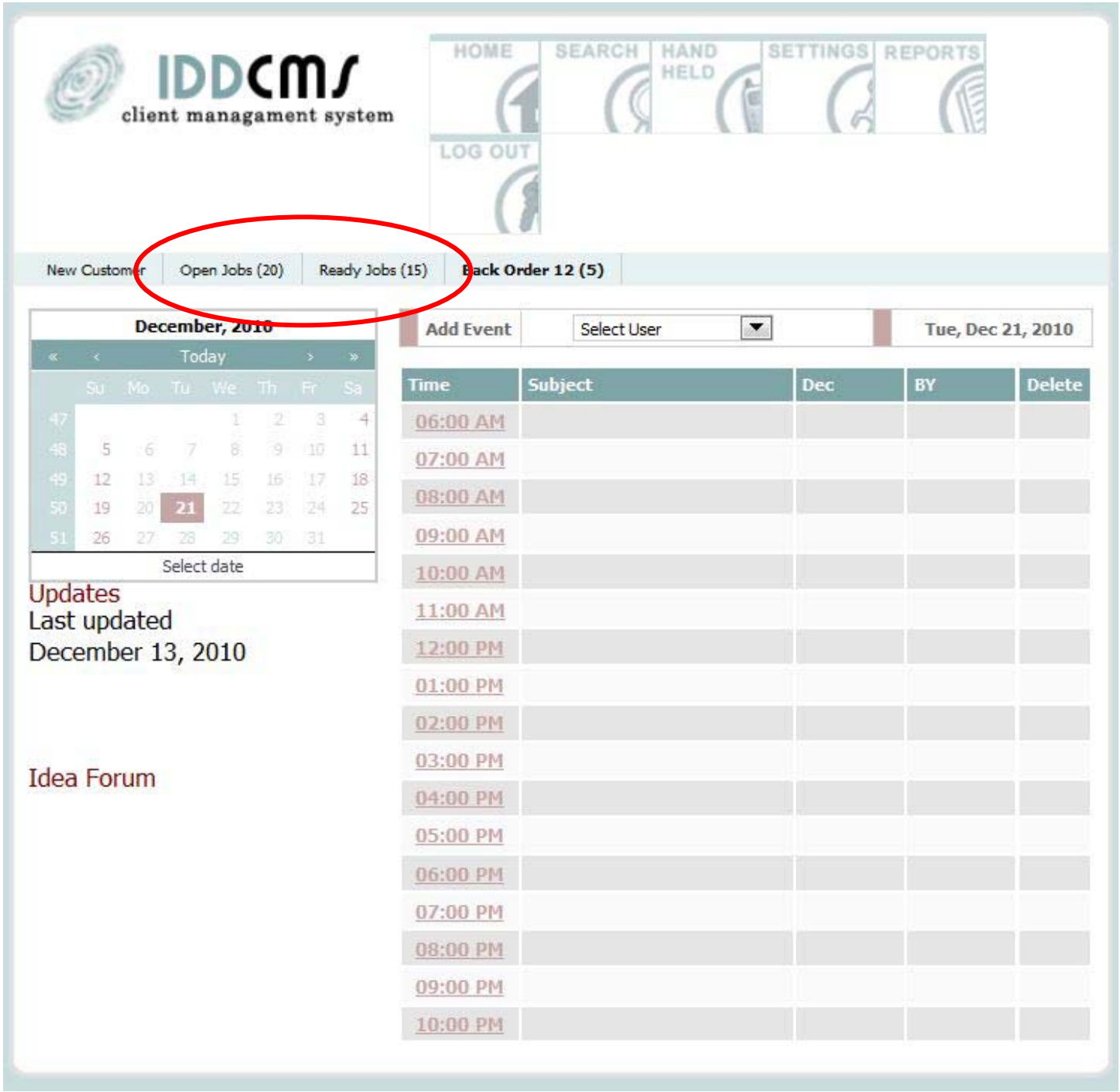
- We suggest you check in your labor and freight when you enter them into the CMS, since you may not receive their invoices until after your installation. If you don't check them in as you enter then, the job will not show up as "Ready" and you won't be aware that you should schedule the installation.

- For items which will be shipped to another receiver, such as fabric going to a furniture manufacturer for a COM piece, check in those items when you receive the invoice for them.

NOTE: When you check in the last item you may have to click Mark Received a couple of times before the job will move to the Ready tab. Please make sure that you do this, otherwise you may not see your job displayed in Ready Jobs, which would alert you that the job is ready to install.

Monitoring

OPEN & READY JOBS



You will use the "Open Jobs(0)" and "Ready Jobs(0)" to monitor the status of your jobs. The number in parentheses to the right of the tab name reflects the number of jobs in the CMS that qualify as "Open" or "Ready," respectively.

To Monitor an Open Job:

- Click the Open Jobs tab to see what jobs are currently Open and waiting for action.

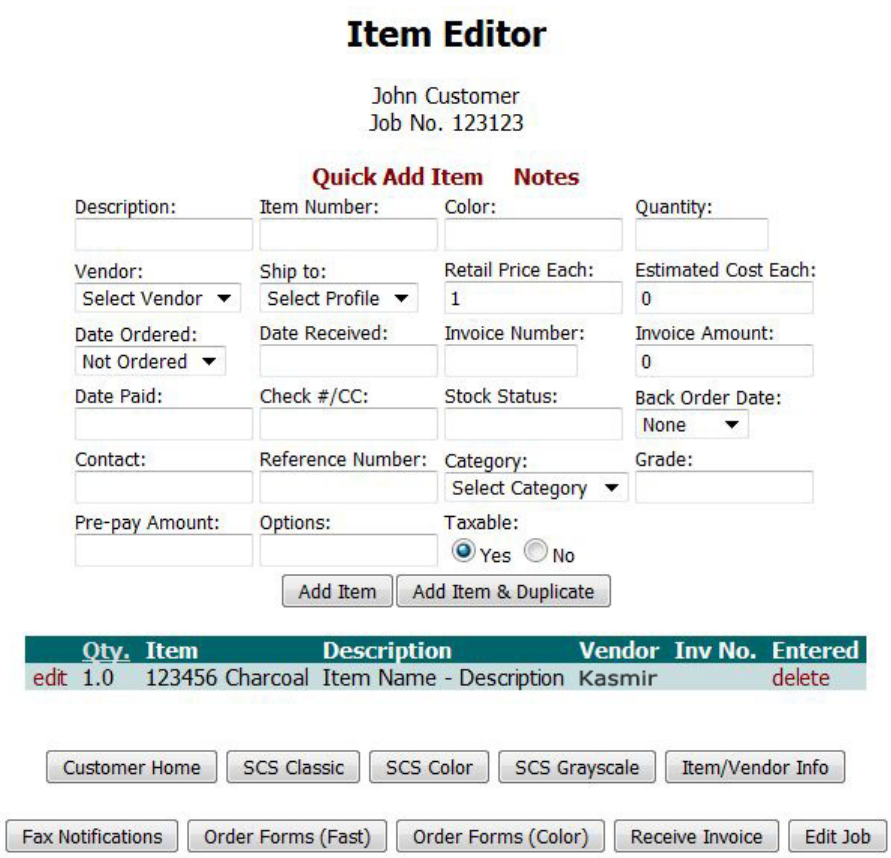
Open Jobs

Job No.	Name	Address	Contract Date	Delete
695001-LL/MS	Charlie & Mary Stierhoff	4230 Black Champ Rd	10/28/10	delete
694983-MS	Dee & John Pakulski	5300 Runnymede Ct	11/11/10	delete
695018-LL/MS	Carol Manuel	6801 Poly Webb Rd #121	11/29/10	delete
695021-LL/MS	Dale & Barbara Wentroble	8401 Fairfield St.	11/24/10	delete
695023-LL/DB	Trace and Debbra Ledbetter	8216 Meadowbrook Dr.	12/1/10	delete
695042-LL/MS	Darcy Fricks	2100 Newt Patterson	12/3/10	delete
695050-LL/DB	Lisa Landry		12/2/10	delete
694982-MS	Debby Lewis	1211 Falcon Ridge	12/2/10	delete
695025-LL/DB	Nita Wiggins	7006 Meadow Bend	12/6/10	delete
695028-LL/MS	Darcy Fricks	2100 Newt Patterson	12/7/10	delete
695030-MS	Debby Lewis	1211 Falcon Ridge	12/9/10	delete
695027-LL/MS	Trace and Debbra Ledbetter	8216 Meadowbrook Dr.	12/6/10	delete
695031-LL/MS	Julie Gooch	7316 Red Leaf Court	12/10/10	delete
000000-LL/MS	Darcy Fricks	2100 Newt Patterson	12/13/10	delete
	Ana & Frank			

These are your currently active jobs that have not had every item checked in as received.

- From here you can select the job which you would like to see. To open a job, click on the Job Number in the far left column.

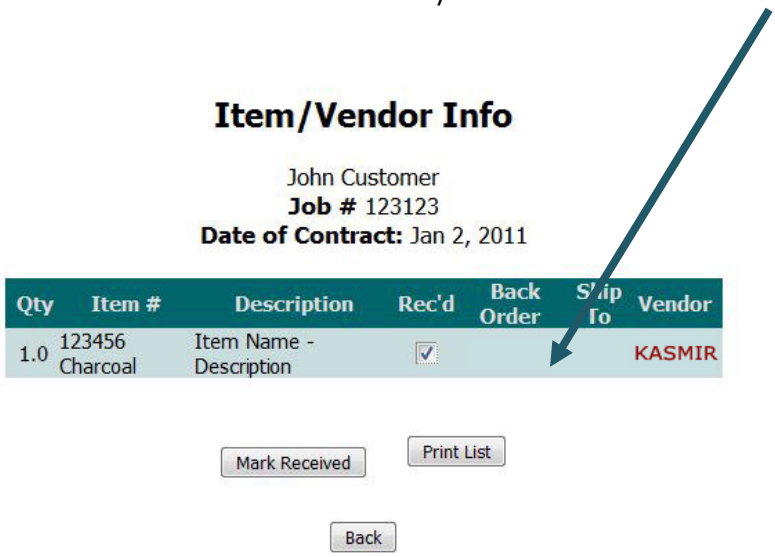
- Selecting the Job Number here will take you to the Item Editor, from which you can navigate the job.



- Click on Item/Vendor Info which will show you what Items are waiting to be checked in.

- In this example, you can see that on this job you are waiting for Item # 123456 from the vendor DDI. Now you can look at your Vendor acknowledgements to see if you will be receiving the item soon or if you need to call the vendor to check on the status of your order.

- If the item is back ordered it would show the B/O Date in red in the Back Order column.



To Monitor Ready Jobs:

- Click the Ready Jobs tab to see what jobs are currently Ready and waiting for installation.

Ready to Install

Job No.	Name	Address	Contract Date	Complete
694888-LL/CP	Nate & Jackie Willett	2200 Cains Ln.	7/26/10	☐
694891-LL/MS	Tammy Widup	6018 Lakehurst Ct	8/10/10	☐
694934-LL/DB	Sundee Miller	1205 Platte Dr.	9/20/10	☐
694937-LL/DB/MS	Lisa Landry		10/6/10	☐
694944-DB	Juli & Michael Warner	2703 Shelterwood Ln	10/14/10	☐
695002-LL/MS	Angela & Bill Kasko	3203 Sgt. Pepper Ct.	11/3/10	☐
695010-LL/MS	Darcy Fricks	2100 Newt Patterson	11/11/10	☐
695015-LL/MS	Caroline & Chris Calhoon	1926 Royal Crest Dr.	11/17/10	☐
	Trace and	8216		

- If a job is displayed in the Ready Jobs tab every item has been received and checked in. You can install this job at any time.

- After installation, the job will continue to display Ready until every Invoice has been received and paid, including those from your installers.

- Once all payments are received and processed (see p 53-60), and decorator commissions are paid you may check that job Complete and click the Mark Complete button at the bottom of the page.
    - This will archive the job into the CMS database. It will be accessible from the customer's Customer Profile page or by searching for the Job Number.

See next page....

Monitoring

BACK ORDERED ITEMS

To Monitor Back Ordered Items:

- Click on the Back Order tab.

- This brings you a list of everything that you have ordered that is Back Ordered. In this list you can see the date the Vendor is due to have the item available and what customer and PO (Job) Number each item belongs to.

Back Orders

PO #	Name	Item	Vendor	B/O Date
		Horse Sculpture	Austin	5/1/10
		Fern/White Bouquet	Utter	5/14/10
		Moss Topiary	Utter	5/14/10
		Orchid Vase	Utter	5/14/10
694982-MS	Lewis	Swags from Kasmir with Trim Option for Living Room	Kasmir	12/23/10
695025-LL/DB	Wiggins	Oval Cambria Jar: Brown Glazed Jar with Lid	Utter	1/15/11
695042-LL/MS	Fricks	Additional Carpet Needed After Installer's Carpet Measure for Vaultroom	S. Carpet	1/16/11
695029-LL/DB	Gonzalez	Bicycle Coat Rack: "Freewheel Coat Rack"	Utter	2/15/11
695025-LL/DB	Wiggins	Cilento: Gold, Silver, Mirror Wall Art	Utter	2/15/11
695033-LL/DB	Chapell	"Aurora" 3'3" x 5'3" Rug - Blue Paisley Rug	SURYA RUG	2/28/11

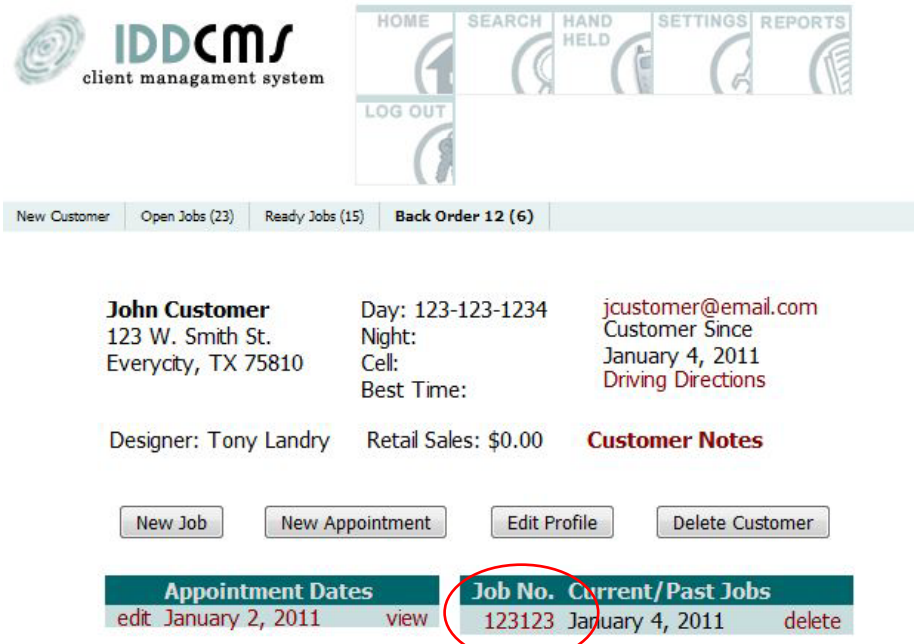
Processing

PAYMENTS & PAID INVOICES

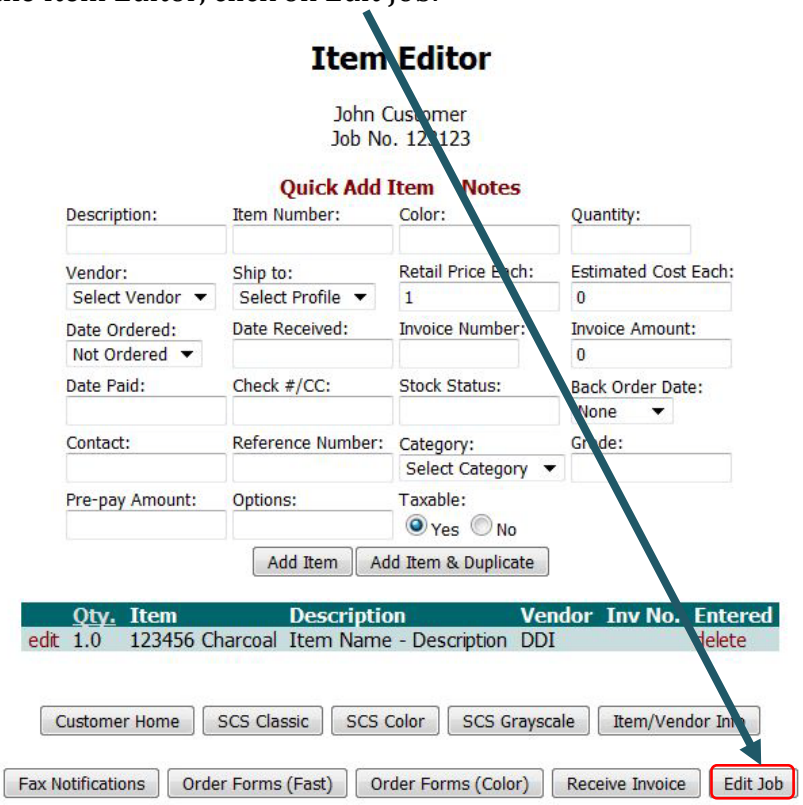
To Process Down Payments and Paid Balances:

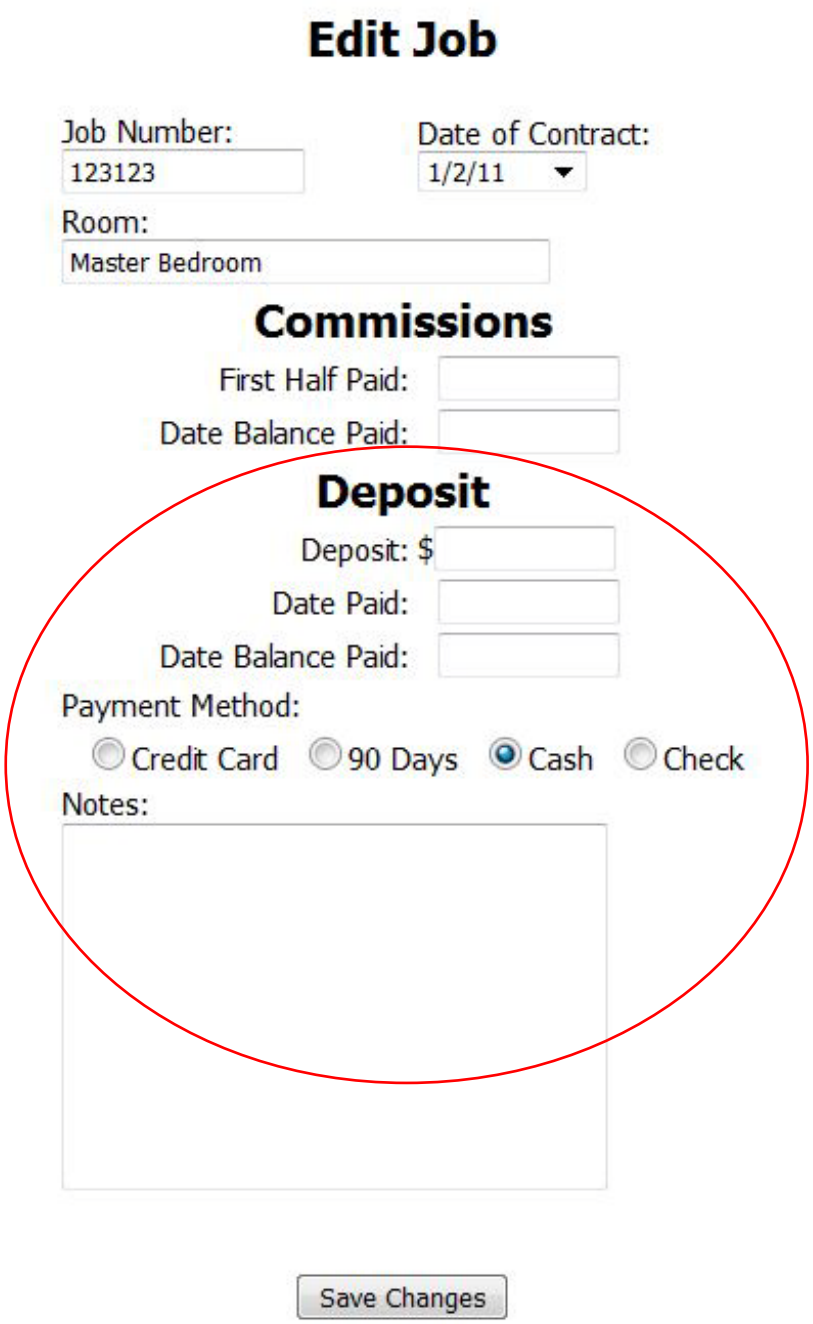
When a new sale is made, wait three days before processing the payment, as specified within the Sales Agreement.

- Go to the customer's Customer Profile (See Searching the CMS on p 29-31).
- Select the Job the payment is associated with by clicking the Job Number.



- You will be at the Item Editor, click on Edit Job.



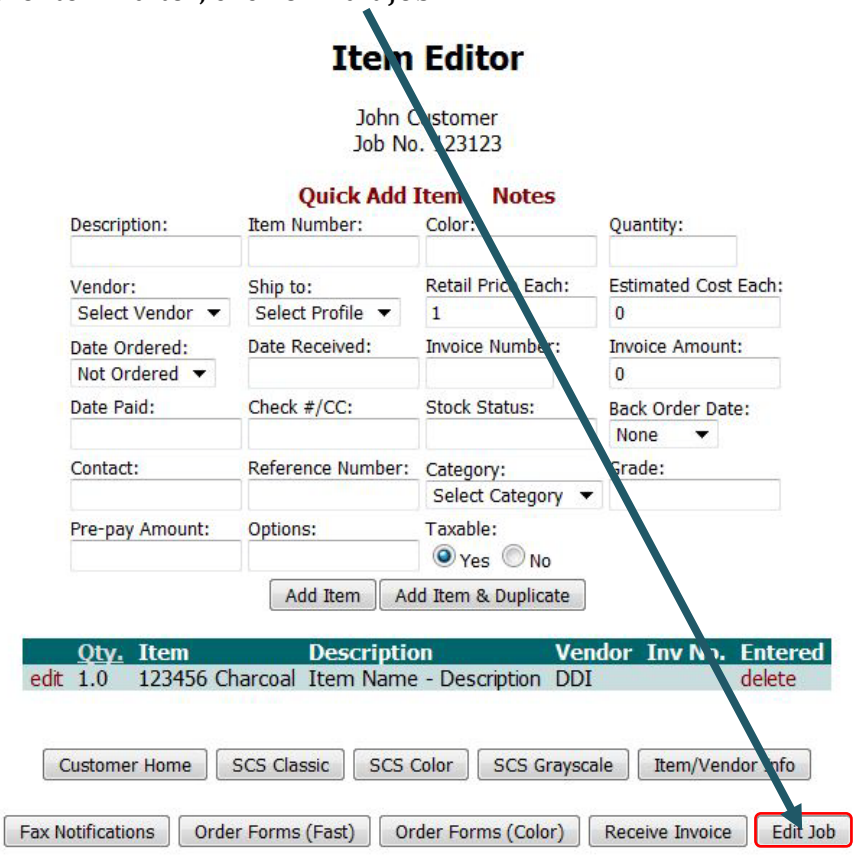


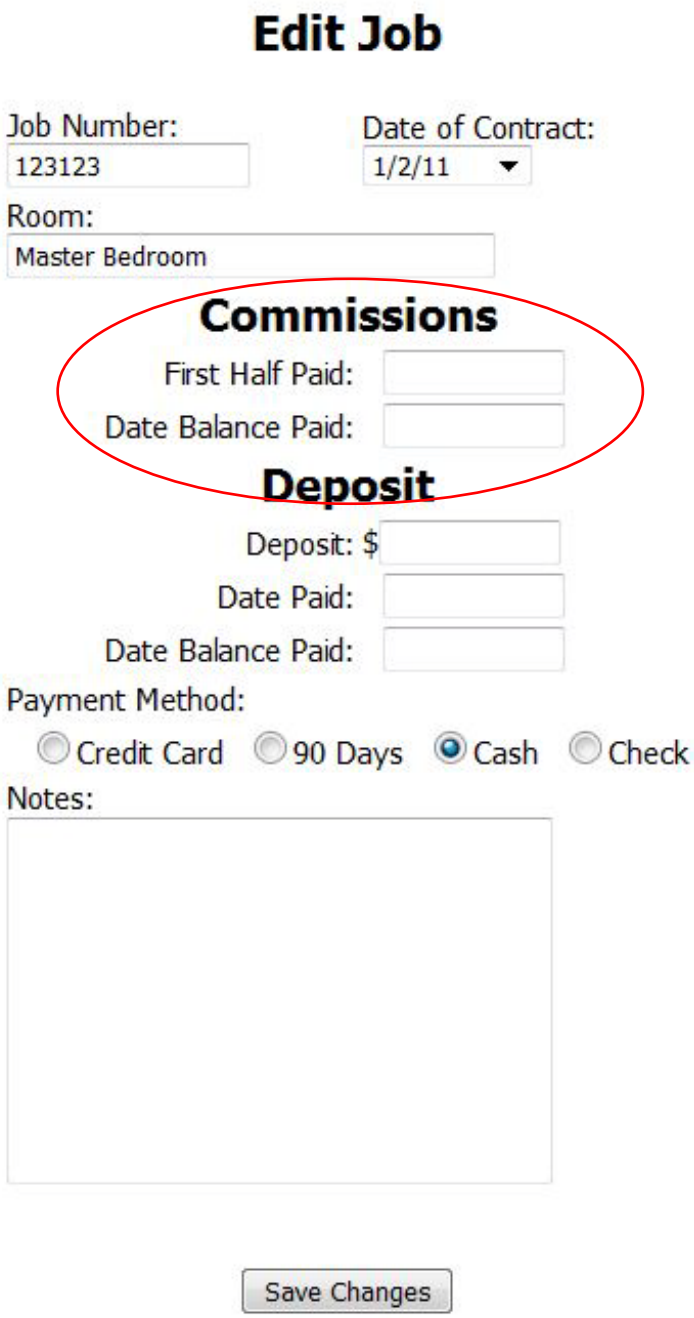
- When you receive a Down Payment is paid you will enter:
  - Deposit Amount - Example: 2100.00
  - Date Paid - Example: 1/23/11
  - Payment Method
  - Notes - Any unique information that you would like to record.
- When you receive a payment towards a Balance you will enter:
  - Date Balance Paid
  - Payment Method

To Record a Commission Payment You Make to a Decorator:

- Go to the customer's Customer Profile (See p 29-31).
- Select the Job the commission is associated with by clicking the Job Number.

- You will be at the Item Editor, click on Edit Job.





- Record the date of payment of commission to the decorator, as you pay the first half and, later, for the second half (balance) in First Half Paid and Date Balance Paid, under the **COMMISSIONS** heading.

Print This Page

Customer Name:	Job Number: 694949-DB	Sales/Cost of Sales	Page 1 of 1
[redacted]	Home Phone:	Business Phone:	Date of Contract: 11/23/10 / Decorator: Dana Blaschko
	Zip Code: 76016	Room: Master Bedroom - Personal Shopping	

Description	Item#/Color	Qty	Vendor	Ship To	Retail Price	Est. Cost	Date Ordered	Date Rec'd.	Inv. No	Inv. Amt.	Date Pd.
1 HR Personal Shopping: sheets, duvet insert, ceiling fan, etc.		1.0	DDI	DDI	$125.00 $125.00	$0.00 $0.00	11/23/10	11/23/10		0.0	

Contact: Ref#: Stock Status:

Retail	Estimated $125.00	Actual $125.00
Total Cost	$0.00	$0.00
Gross Profit	$125.00	$125.00
Gross Profit %	100.00%	100.00%
Commissions	$18.75	$18.75
1st Half $9.375 Date Pd.		
Balance $9.375 Date Pd.		

Retail Totals	$125.00
Sales Tax	$0.00
Total Charges	$125.00
Deposit	$125.00
Date Paid	11-24-10
Balance	$0.00
Date Paid	11-24-10

Notes

- The decorator's commission is automatically calculated by the CMS based upon Profit Margin and can be viewed in the Sales/Cost of Sales. You can quickly see how much commission is owed a decorator on each job from this document.

- As the invoices arrive, the "actual" columns in the S/COS will automatically adjust, so that when the job is complete, the Actual Commission earned on the entire job will be shown and the 1st Half Commission, which has been paid, will be deducted from this amended total - showing the Balance (Second Half) due to the decorator.

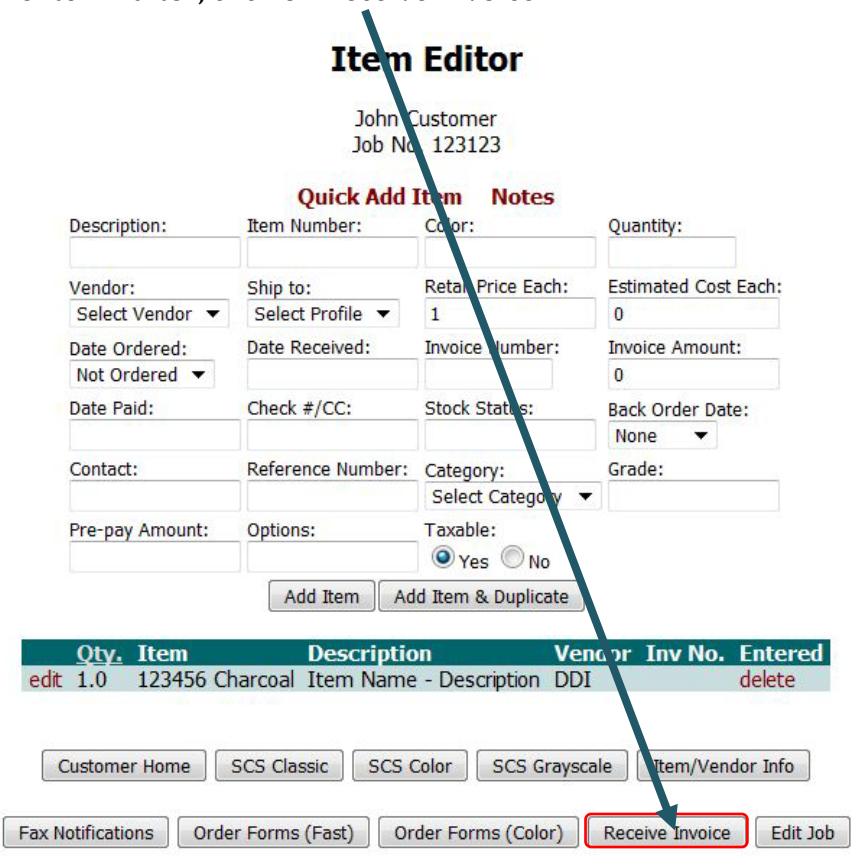
To Process Invoices:

When you are paying a Vendor Invoice, record that payment in the CMS.

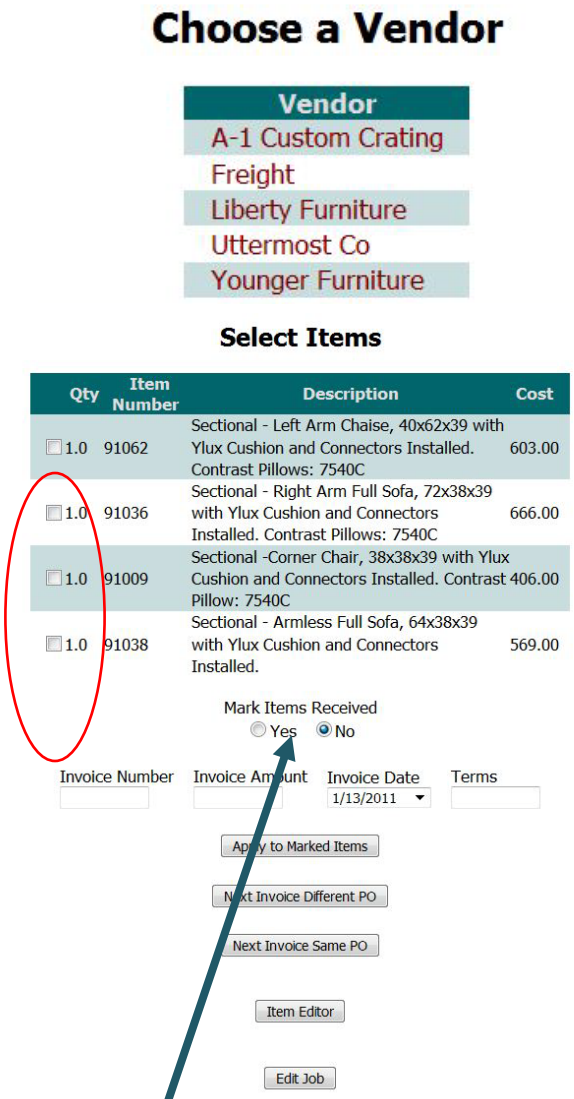
- Once all invoices are entered, final profit percentage can be determined and the decorator can receive the commission for the job (See p . 56-58)

- Go to the customer's Customer Profile (See p 29-31).
- Select the Job the invoice is associated with by clicking the Job Number.

- You will be at the Item Editor, click on Receive Invoice.



- Select the vendor whose invoice you are recording and preparing to pay.


Choose a Vendor
Vendor
A-1 Custom Crating
Freight
Liberty Furniture
Uttermost Co
Younger Furniture
Select Items
Qty
Item Number
Description
Cost
1.0 91062 Sectional - Left Arm Chaise, 40x62x39 with Ylux Cushion and Connectors Installed. Contrast Pillows: 7540C 603.00
1.0 91036 Sectional - Right Arm Full Sofa, 72x38x39 with Ylux Cushion and Connectors Installed. Contrast Pillows: 7540C 666.00
1.0 91009 Sectional -Corner Chair, 38x38x39 with Ylux Cushion and Connectors Installed. Contrast Pillow: 7540C 406.00
1.0 91038 Sectional - Armless Full Sofa, 64x38x39 with Ylux Cushion and Connectors Installed. 569.00
Mark Items Received
Yes
No
Invoice Number
Invoice Amount
Invoice Date
1/13/2011
Terms
Apply to Marked Items
Next Invoice Different PO
Next Invoice Same PO
Item Editor
Edit Job

- Check the box next to all of the items on the invoice that you are paying.
- Record:
  - Invoice Number
  - Invoice Amount
  - Invoice Date
  - Terms - Net 30 Days, Net 15 Days, etc. (if applicable)

- **MARK ITEMS RECEIVED** - If you are only receiving the invoice and have not received the item do not check YES. This box defaults to NO.
- Click Apply to Marked Items.

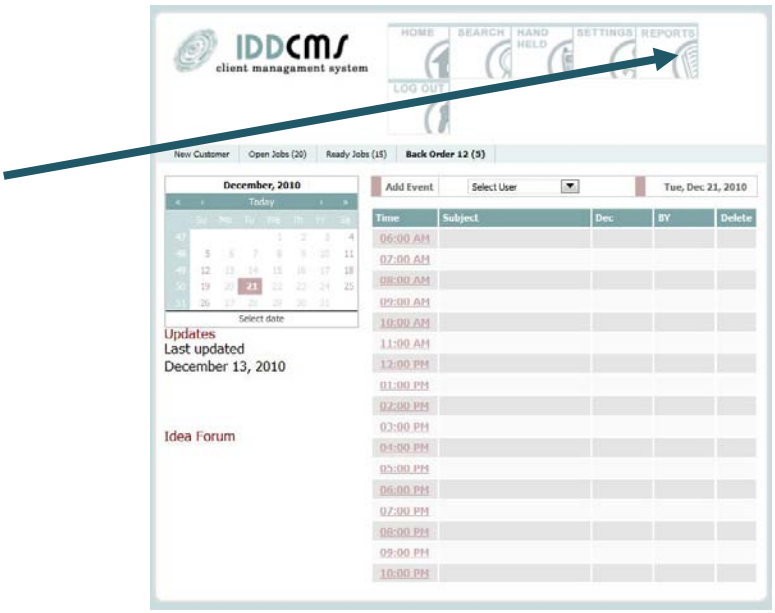
ABOUT: Next Invoice Different PO and Next Invoice Same PO are used to continue recording invoices, either for different jobs (Different PO) <u>OR</u> for the same job (Same PO) but from a different vendor.

Using the

REPORTS MENU

ACCESSING REPORTS:

- Click on Reports.



- This will take you to the Reports Menu (see below.)

Sales Report
SCS Summary
YTD Sales Report
Vendor Sales Report
Vendor Balance Report
Due Balances
Appointment Register
Customer Sales Report
Category Sales Report

To View a Sales Report:

This is a quick way to see an overview of your sales for the particular period of time.

- Click on Sales Report (from the Reports Menu)
- You will be taken to the screen below where you can choose which month's Sales Report (from the drop down box) you would like to view.
- After selecting the month, Click "HTML (fast)"

- This report shows each sale made in the selected month, ordered chronologically.
- From this report you can see:
  - The breakdown of product category totals for each sale (soft window, etc.)
  - The product category totals for the entire month are shown in the bottom row of the table.
  - Your average sales amount
  - The number of appointments you went on
  - The number of sales you made

Franchise No.	Begin Date	End Date	Month	Year
65678			January	2011

Name: **Decorating Den Interiors**

City/State/Province/Zip/Postal Code: **1205 Sturgeon Ct Arlington, TX 76001**

INTERIORS by Decorating Den

Monthly Sales Report

December February

Job No.	Customer	Date Sold	Soft Window	Hard Window	Bed Covering	Floor Covering	Wall Covering	Furniture	Case Goods	Lighting	Accessories	Other	Total
694858-MS	Pakulski	3	0	0	0	0	0	0	0	0	598	0	598
695046-LL/MS	Kasko	3	0	0	0	0	0	0	0	0	996	0	996
		Total	0	0	0	0	0	0	0	0	1594	0	1594

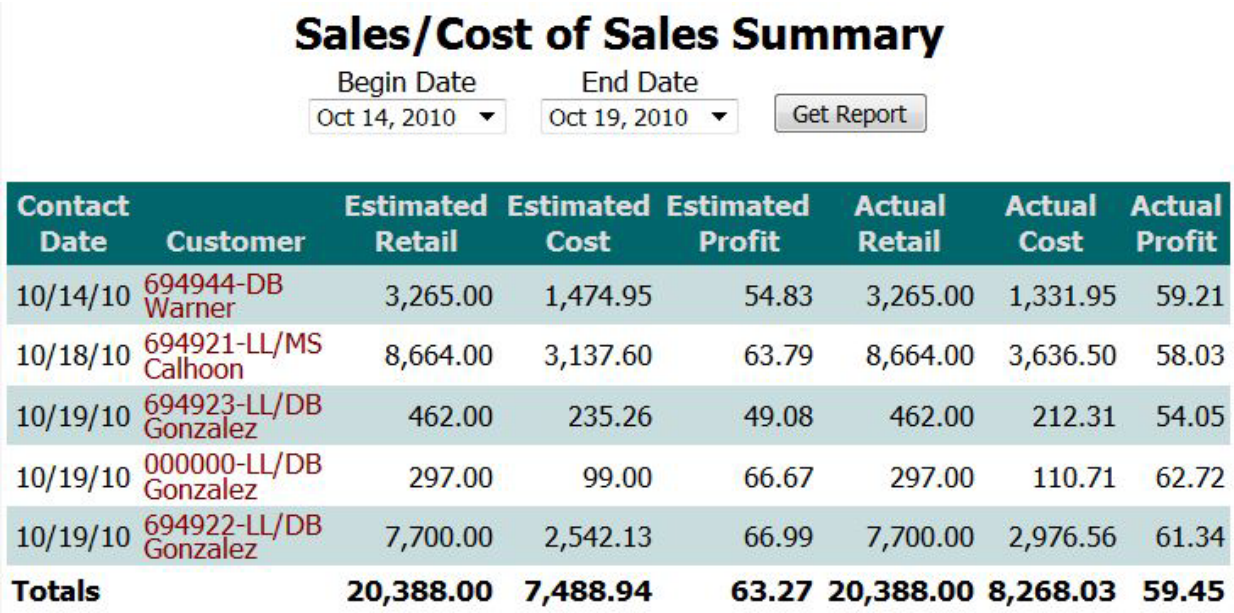
	No. Appts. **4**	No. of Sales **2**	Service Fees:	
Signature		Average Sale **$797.00**	NMF 2% or Minimum:	
		Check No.	**Total Remittance**	

To View a SCS (Sales/Cost of Sales) Summary:

This is a great way to quickly assess your profit margins for a particular time periord.

- Click on SCS Summary (from the Reports Menu)
- You will be taken to the screen below where you can choose beginning and ending dates for the data you would like to view.
- Click Get Report

- This report shows each sale made in the selected time period, ordered chronologically.
- From this report you can see:
  - The estimated retail for each job you sold
  - The actual retail for each job you sold
  - The estimated cost for each job you sold
  - The actual cost for each job you sold
  - The estimated profit percentage for each job you sold
  - The actual profit percentage for each job you sold
  - The average profit of all jobs in that time period



Sales/Cost of Sales Summary

Begin Date: Oct 14, 2010 ▾ End Date: Oct 19, 2010 ▾ Get Report

Contact Date	Customer	Estimated Retail	Estimated Cost	Estimated Profit	Actual Retail	Actual Cost	Actual Profit
10/14/10	694944-DB Warner	3,265.00	1,474.95	54.83	3,265.00	1,331.95	59.21
10/18/10	694921-LL/MS Calhoon	8,664.00	3,137.60	63.79	8,664.00	3,636.50	58.03
10/19/10	694923-LL/DB Gonzalez	462.00	235.26	49.08	462.00	212.31	54.05
10/19/10	000000-LL/DB Gonzalez	297.00	99.00	66.67	297.00	110.71	62.72
10/19/10	694922-LL/DB Gonzalez	7,700.00	2,542.13	66.99	7,700.00	2,976.56	61.34
Totals		**20,388.00**	**7,488.94**	**63.27**	**20,388.00**	**8,268.03**	**59.45**

To View a YTD Sales Report:

This report shows at-a-glance decorator sales statistics for any selected year.

- Click on YTD Sales Report (from the Reports Menu)

- You will be taken to the screen below where you can choose which year's Sales Report (from the drop down box) you would like to view.

- Click HTML (fast)

- From this report you can see the YTD values for each decorator:
  - The number of appointments that decorator went on
  - The number of sales that decorator made
  - The closing percentage for that decorator
  - The total amount of sales for that decorator
  - The average sale size for that decorator

YEAR TO DATE SALES
2010

NAME	APPTS	SALES	CLOSE %	SALES $	AVERAGE SALE
Sue Salesperson	143	125	87%	$420,789.00	$3366.31
Sally Retail	45	39	86%	$92,536.00	$2372.72
Jo Top-Seller	14	9	60%	$30,721.00	$3413.44
Total for 2010	202	173	77%	$544,046.00	$3050.82

To View a Vendor Sales Report:

This reports shows an overview of the business you have done with each Vendor over a particular time period.

- Click on Vendor Sales Report (from the Reports Menu)
- You will be taken to the screen below where you can choose beginning and ending dates for the Vendor Sales Report you would like to view.

- Click HTML (fast)
- This report shows sales amounts by vendor.
- From this report you can see the YTD values for each Vendor:
  - The retail amount per vendor
  - The wholesale cost per vendor
  - The profit from sales per vendor

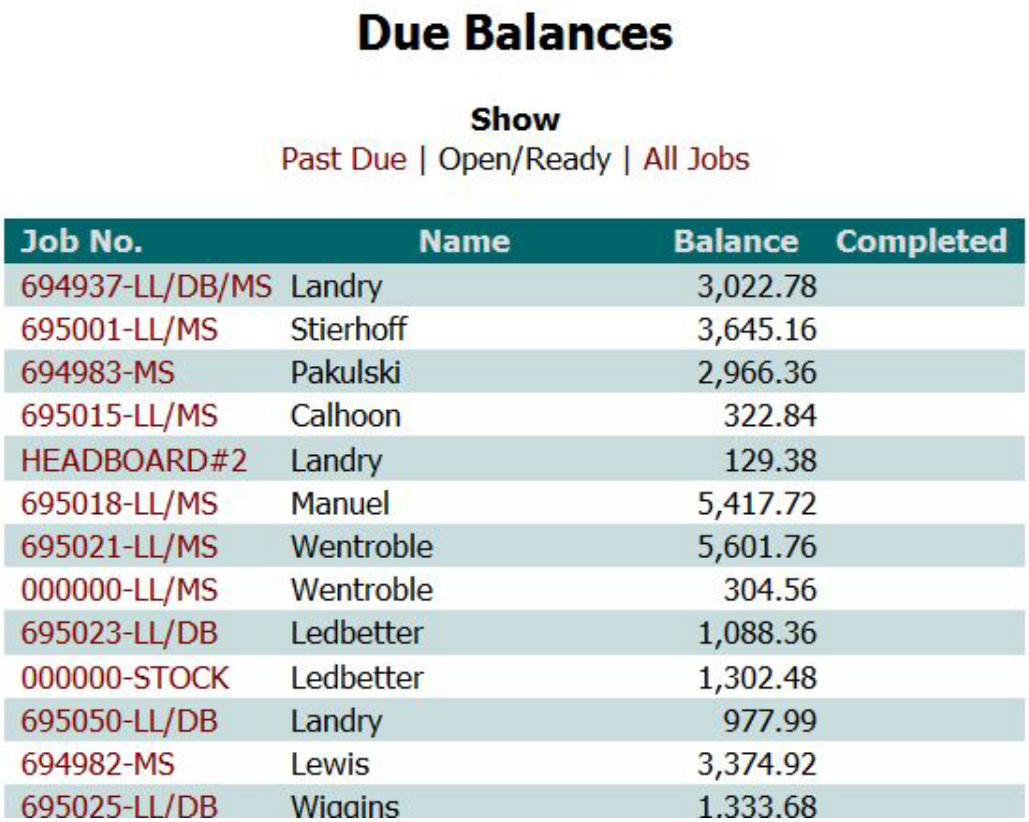
VENDOR	RETAIL	COST	MARGIN
A-1 Custom Crating	0.00	0.00	0.00
A.F. Schmalzied	0.00	0.00	0.00
AAA Cooper Transportaion	0.00	0.00	0.00
Accent Tile	0.00	0.00	0.00
Accents Beyond, Inc	0.00	0.00	0.00
Aldik	0.00	0.00	0.00
Ambella Home Collection	0.00	0.00	0.00
American Drew	0.00	0.00	0.00
Archipelago Candles	0.00	0.00	0.00
Ardinger	0.00	0.00	0.00
Ariel Art	0.00	0.00	0.00
Art & Frame Warehouse	0.00	0.00	0.00
Arteriors	2,091.00	697.00	1,394.00
Austin	0.00	0.00	0.00
Averitt Express	0.00	0.00	0.00

To View a Due Balances Report:

From this report you can see the Due Balances for your franchise, which jobs a customer owes money on.

- Click on Due Balances (from the Reports Menu)
- You can sort by:
    - Past Due - Shows jobs which have been installed and a balance remains due.
    - Open/Ready - Shows jobs with a balance but that are either not ready or not installed.
    - All Jobs - Combines both report

- From this report you can see on which jobs a customer owes you money:
    - The Job Number and Customer Name of each project with a balance due
    - The remaining balance on that project
    - The date that the project was marked complete.
    - The total outstanding balances due to your franchise



Due Balances

Show

Past Due | Open/Ready | All Jobs

Job No.	Name	Balance	Completed
694937-LL/DB/MS	Landry	3,022.78	
695001-LL/MS	Stierhoff	3,645.16	
694983-MS	Pakulski	2,966.36	
695015-LL/MS	Calhoon	322.84	
HEADBOARD#2	Landry	129.38	
695018-LL/MS	Manuel	5,417.72	
695021-LL/MS	Wentroble	5,601.76	
000000-LL/MS	Wentroble	304.56	
695023-LL/DB	Ledbetter	1,088.36	
000000-STOCK	Ledbetter	1,302.48	
695050-LL/DB	Landry	977.99	
694982-MS	Lewis	3,374.92	
695025-LL/DB	Wiggins	1,333.68	

Until you have filled in Deposit, Date Paid, and Date Balance Paid in the Edit Job page(see p 54-55) for the job it will continue to show in the Due Balances list.

To View the Appointment Register:

From this report you can keep track of the leads from a given month.

- Click on Appointment Register (from the Reports Menu)
- Select the month you are interested in from the drop down box.

- Click HTML (fast)
- From this report you can see:
  - The appointments scheduled during the selected month
  - Where each lead came from
  - The sale amount from that lead
  - The advertising dollars spent that month
  - The calculated Cost Per Lead in terms of advertising dollars
  - The Closing Percentage for the month
  - The Average Sale for the month
  - The Total Sales for the month

Lead/Appt. Register

Fr. No.	Franchise Name	City, State	Month/Year
65678	**Decorating Den Interiors**	**Arlington, TX**	**Dec 2010**

Job#	Name	Dec.	Appt. Date	Flyers	Cust. Care	Prospecting	Prev. Cust.	Referral	Direct Mail	Newspaper	Television	Radio	Yellow Pages	Web Site	ColorVan	Home Shows	Workshops	Magazines	New Owner	Other	Sale Amount
695024	A Gonzalez	L Landry	1				x														2118
694950	N Milford	L Landry	1											x							26
695023-LL/DB	T Ledbetter	L Landry	1				x														2017
000000-STOCK	T Ledbetter	L Landry	1				x														1206
695050-LL/DB	L Landry	L Landry	2				x														930
695042-LL/MS	D Fricks	L Landry	3				x														1014
695051-LL/DB	A Gonzalez	L Landry	3																		-94
695025-LL/DB	N Wiggins	L Landry	3				x														2471
695052-LL/DB	T Ledbetter	L Landry	6				x														998
695054-LL/DB	M Casey	L Landry	6				x														1190
695053-LL/DB	J Warner	D Blaschko	6				x														331
695027-LL/MS	T Ledbetter	L Landry	6				x														2798
695028-LL/MS	D Fricks	L Landry	7				x														15236
695030-MS	D Lewis	M Smith	9				x														2672
	N Willett	L Landry	9				x														0
695031-LL/MS	J Gooch	L Landry	10				x														140
000000-LL/MS	D Fricks	L Landry	13				x														426
695032-LL/DB	T Ledbetter	L Landry	16				x														781
695043-LL/MS	S Baca	L Landry	16				x														200
695056-LL/MS	D Fricks	L Landry	16				x														5892
695029-LL/DB	A Gonzalez	L Landry	16				x														6456
695044-LL/MS	J DeMott	L Landry	17				x														6667
695045	A Keeling	L Landry	18				x														0
695033-LL/DB	D Chapell	L Landry	21				x														5973
695083-LL/DB	A Gonzalez	L Landry	23				x														0
	D Pakulski	M Smith	30				x														0
694982-MS	D Lewis	M Smith																			6249
Total All Leads			25	0	0	0	24	0	0	0	0	0	0	1	0	0	0	0	0	0	65696
Advertising Dollars Spent This Month			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cost Per Lead			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	65696

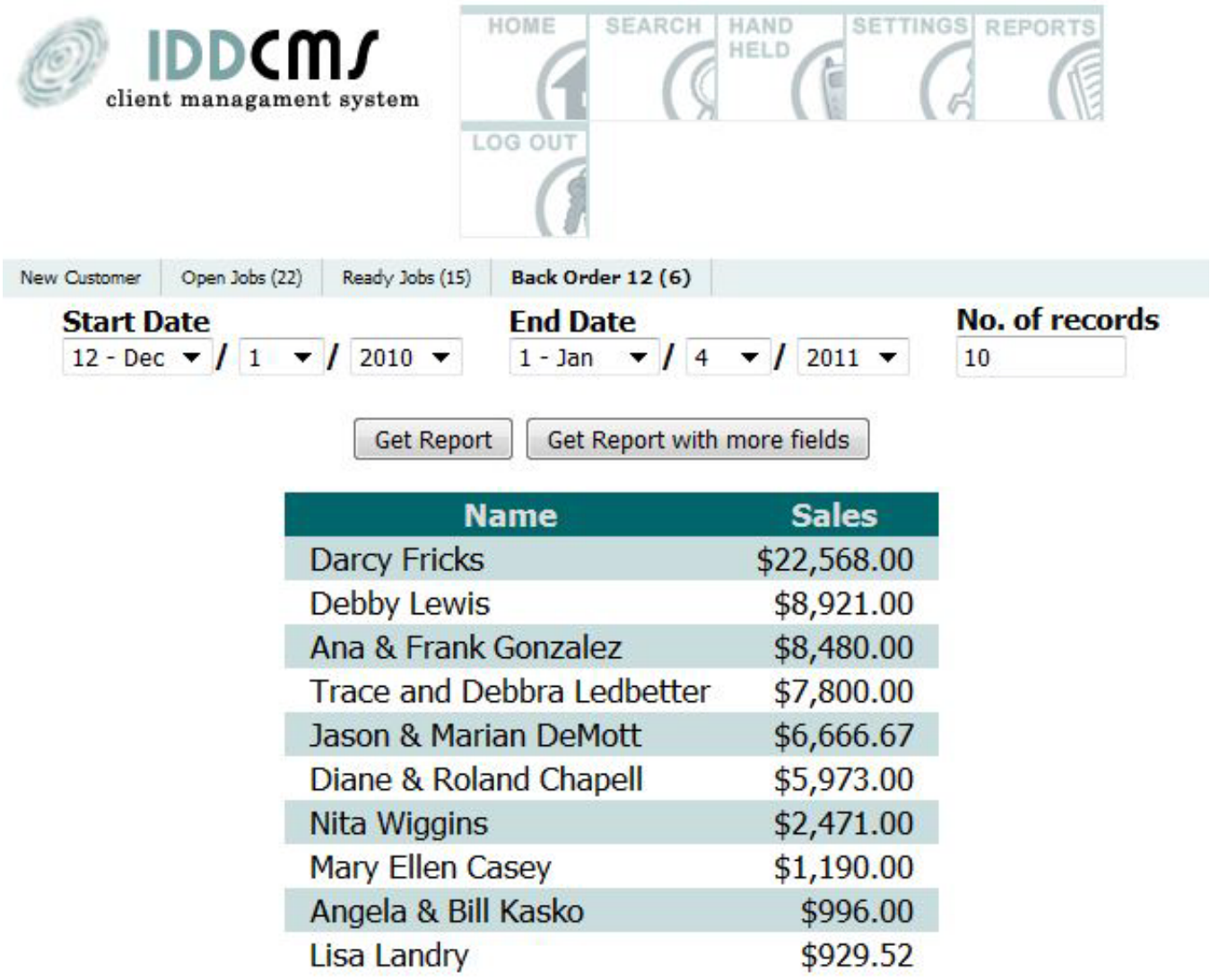
Monthly Summary

Appts Completed	No. Sold	Closure %	Average Sale	Total $ Sold
25	**24**	**96.00%**	**$2737.35**	**$65696.44**

To View the Customer Sales Report:

This is a good way to view your customers ranked in order of cumulative sales for any particular period of time (top 10 for the year, top 200 to mail calendars to, etc.).

- Click on Customer Sales Report (from the Reports Menu)
- Choose a Start and End Date from the drop down boxes, Click Get Report.
- From this report you can see:
    - Customer name
    - Total sales for that period of time
    -
- If you select Get Report With More Fields, you can also see:
    - Customer Address
    - Customer Email Address
    - Customer Phone Number



To View a Category Sales Report:

This is where you can assess your volume of sales in each product category.

- Click on Category Sales Report (from the Reports Menu)
- Choose a Start and End Date from the drop down boxes, Click Get Report.

- From this report you can see:
  - Category Sales amount
  - Percentage of Sales per Category

CATEGORY	SALES	% OF SALES
Soft Windows	16,011.85	23.80
Hard Windows	2,798.00	4.16
Bed Coverings	4,689.00	6.97
Floor Coverings	1,918.00	2.85
Wall Coverings	0.00	0.00
Uphol. Furniture	9,960.67	14.80
Case Goods	12,936.67	19.23
Lighting	5,167.00	7.68
Accessories	15,496.25	23.03
Other	1,521.00	2.26
TOTAL	**67,290.44**	**100.00**

Using the

EXPENSE & CREDIT REGISTERS

To Use the Advertising Expense Register:

- From the Settings Menu (p 6)
- Click on Expense Register

- This report shows a list of advertising costs over time.

- The information from this Register is used by the CMS to determine your cost per lead in terms of advertising dollars.

To Enter an Advertising Expense:

- Enter the Advertising Source in Payee
- Enter the total cost of the ad in Amount
- Select the appropriate category from the drop down box
- Select the Date Paid
- Add any memos regarding the ad
- Click Add Expense

- This information is automatically transferred to the Appointment Register and used to calculate cost per lead.

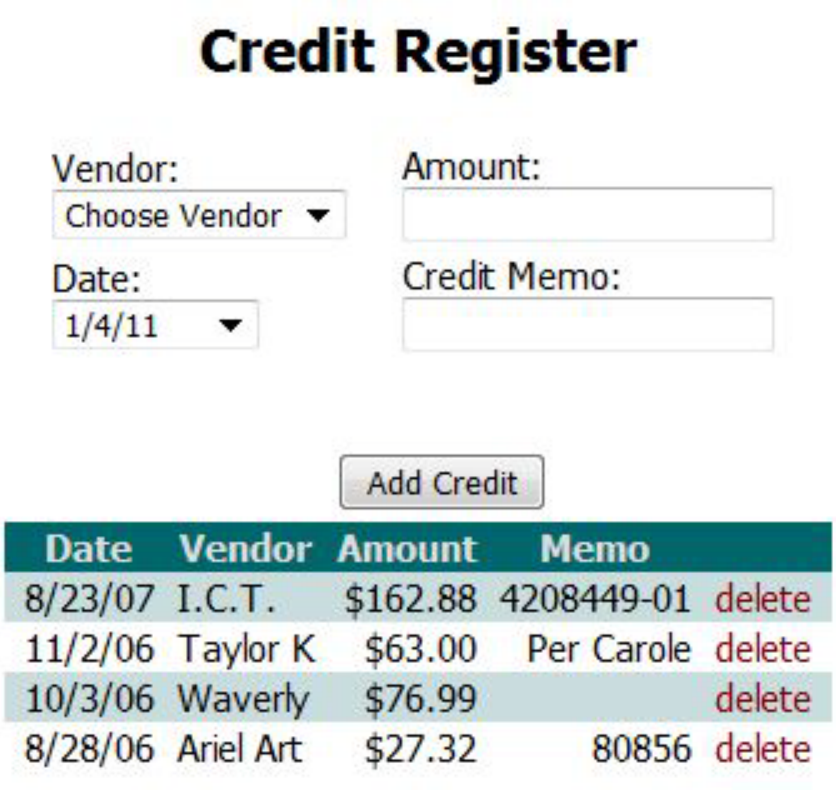
To Use the Vendor Credit Register:

This is where you will enter credits for returns of products you have made to vendors or overpayments made to vendors.

- From the Settings Menu (p 6)
- Click on Credit Register

To Add a Vendor Credit:

- Choose the Vendor from the drop down box
- Enter the total amount of the credit in the Amount box
- Select the Date the credit was awarded
- Enter the reason for the credit in the Credit Memo box
- Click Add Credit



- We suggest you periodically review this register to request that those credit are applied on future orders with that vendor.

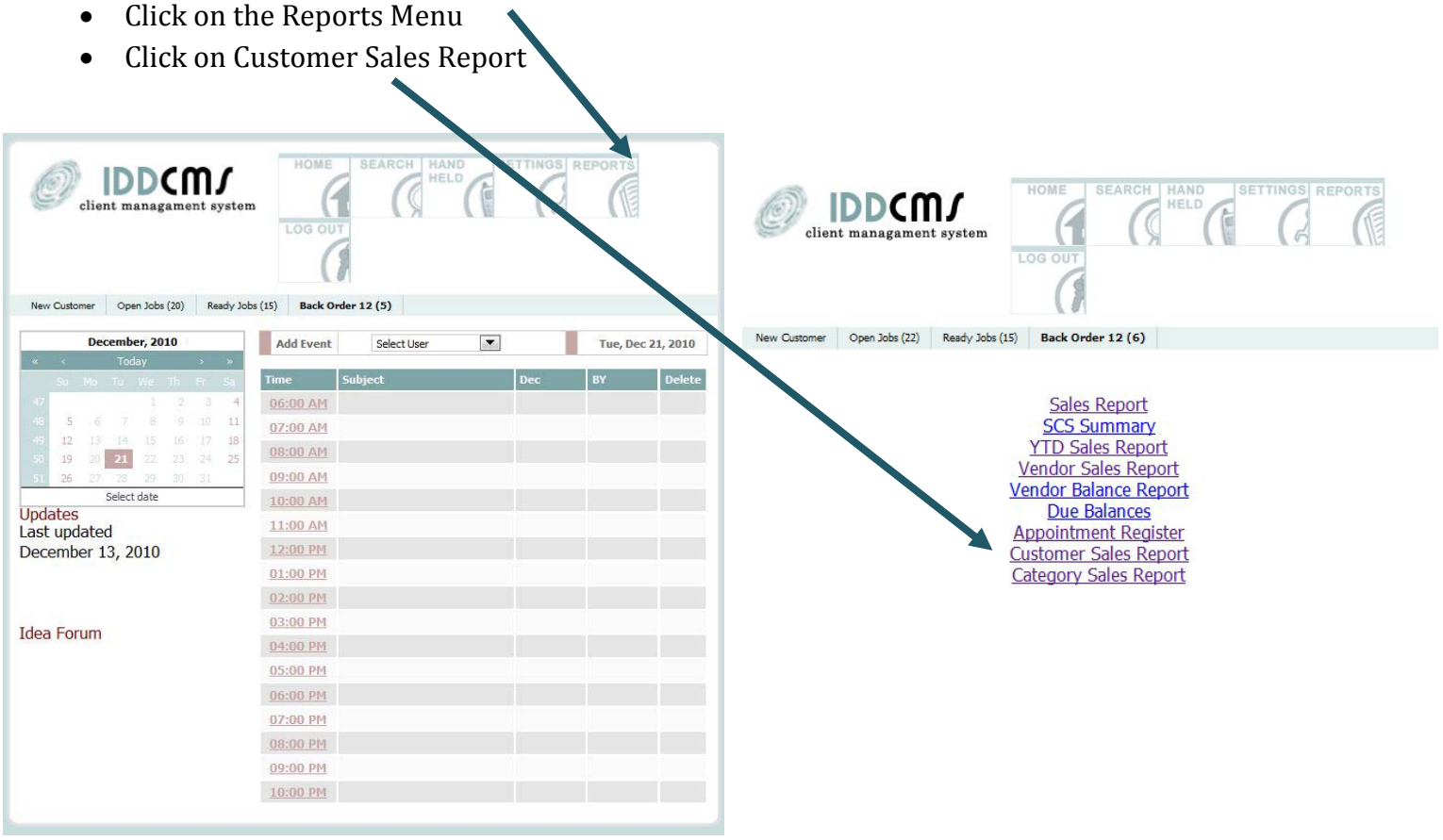
Creating

MAIL MERGE LABELS

To Create Mail Merge Labels:

You can use the customer information you have entered into the CMS to quickly and easily create mailing labels for your customers.

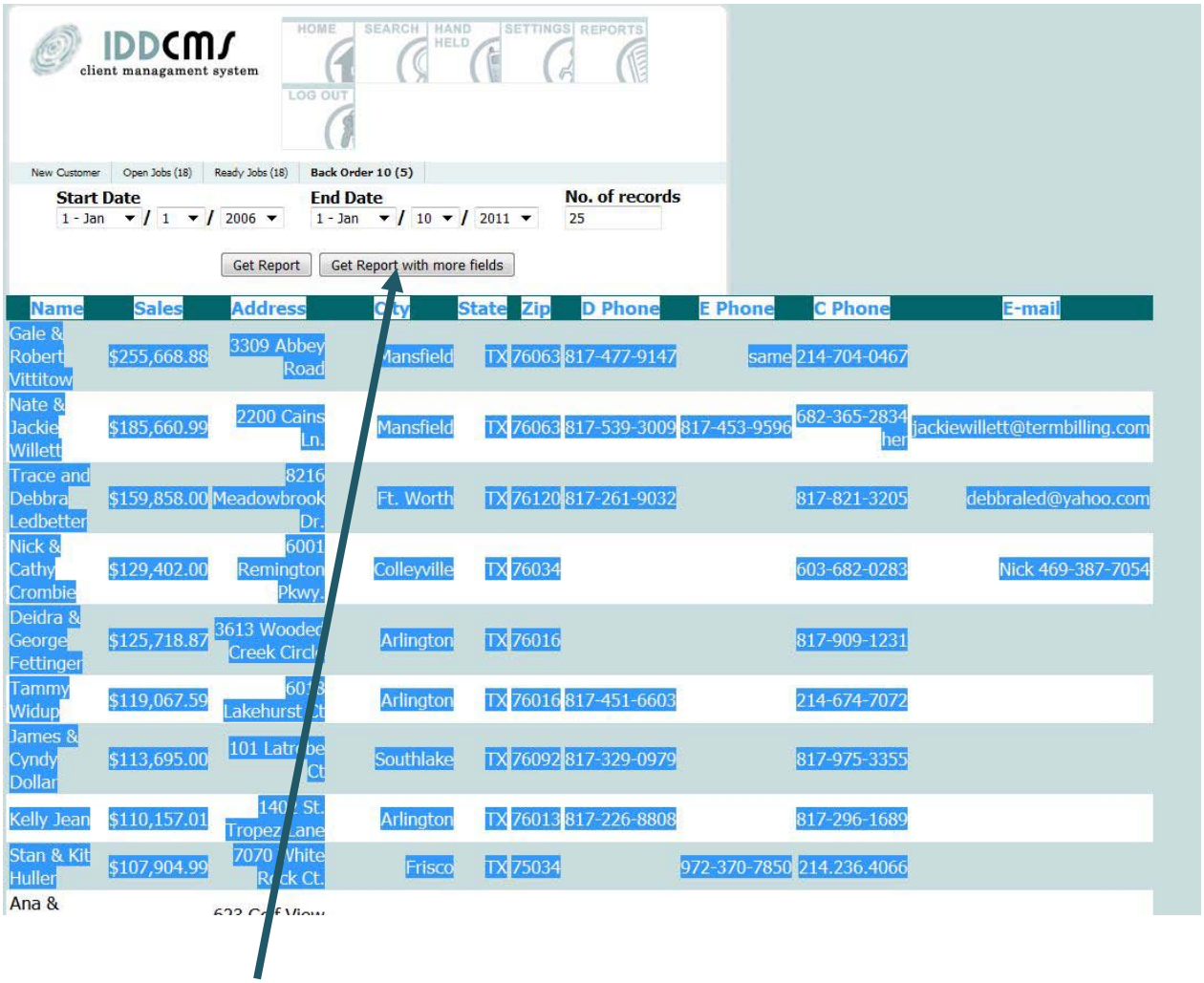
- Go to the Customer Sales Report (p 65)
- Click on the Reports Menu
- Click on Customer Sales Report



- Use the Start Date, End Date, and No. of Records boxes to manipulate which customers you would like to be included in the list.
- For example, let's say you want to send a coupon to your top 25 customers and you want to include anyone who has purchased something in the past five years into that pool.

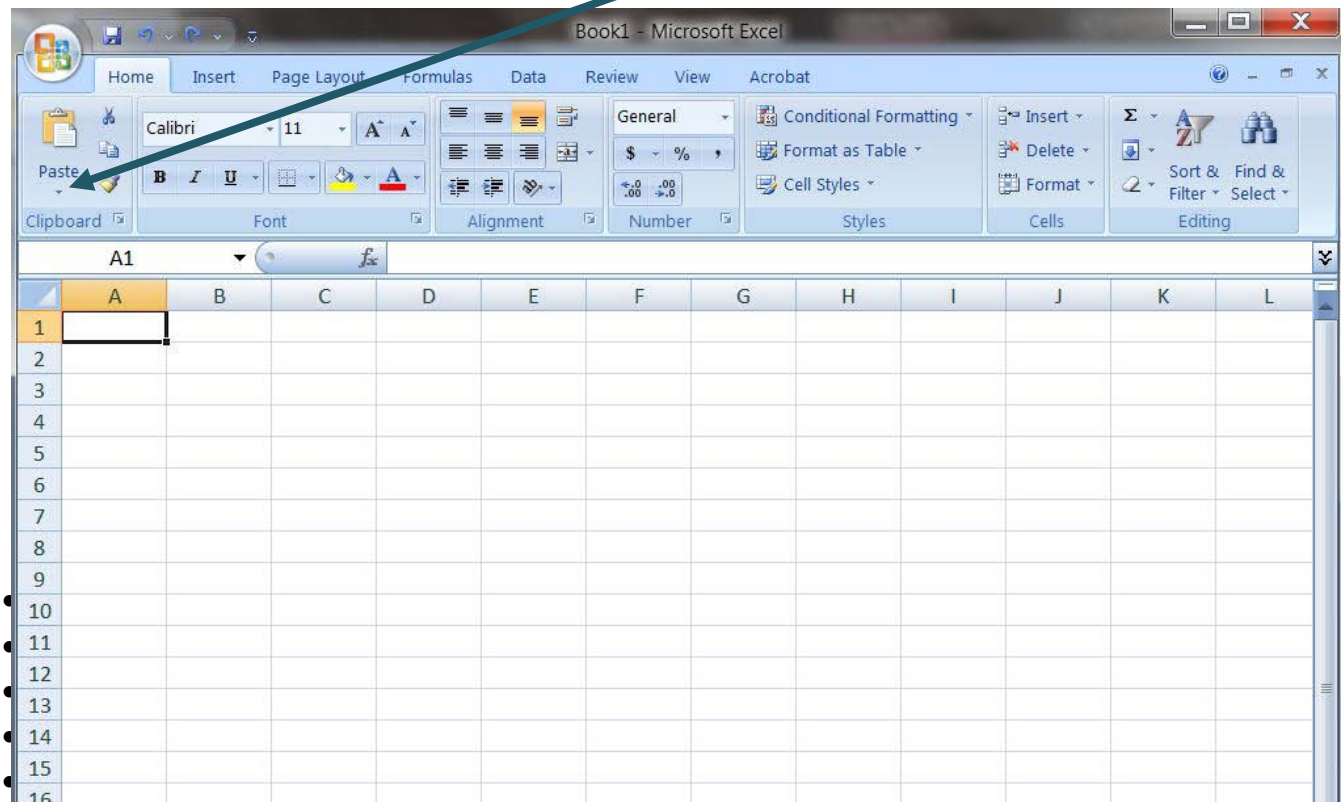
    - You would set the Start Date at Jan 1, 2006 and the end date at today, or in this case Jan 1, 2011.
    - You would set the No. of Records to 25 because you only want to send out 25 coupons.

    NOTE: You could set the No. of Records as high as you want, even high enough to include all of your customers if you wanted to send a mailer to everyone.



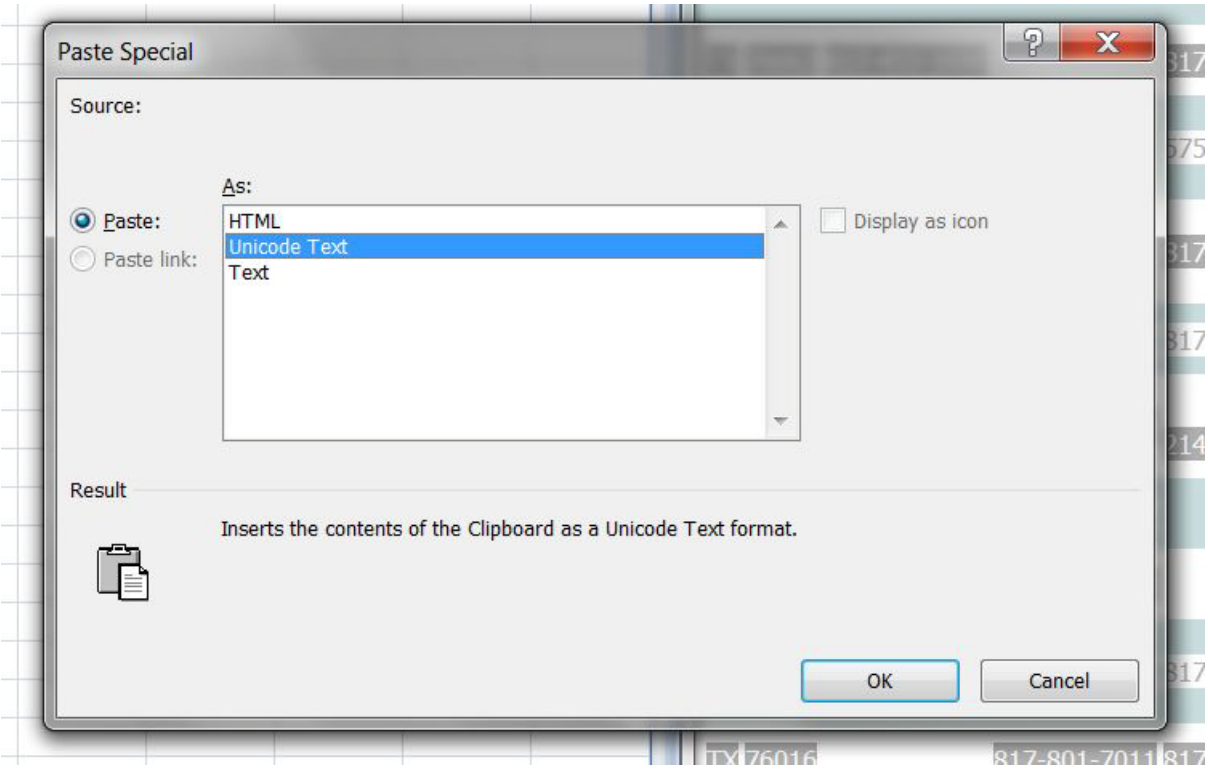
- Click Get Report with more fields - This will show the address information for each customer.
- Select (left click and drag to select) ALL of the customer information as well as the category titles (Name, Sales, Address, etc.) as shown above.
- Right click and select Copy.
- **Open a blank Excel spreadsheet**

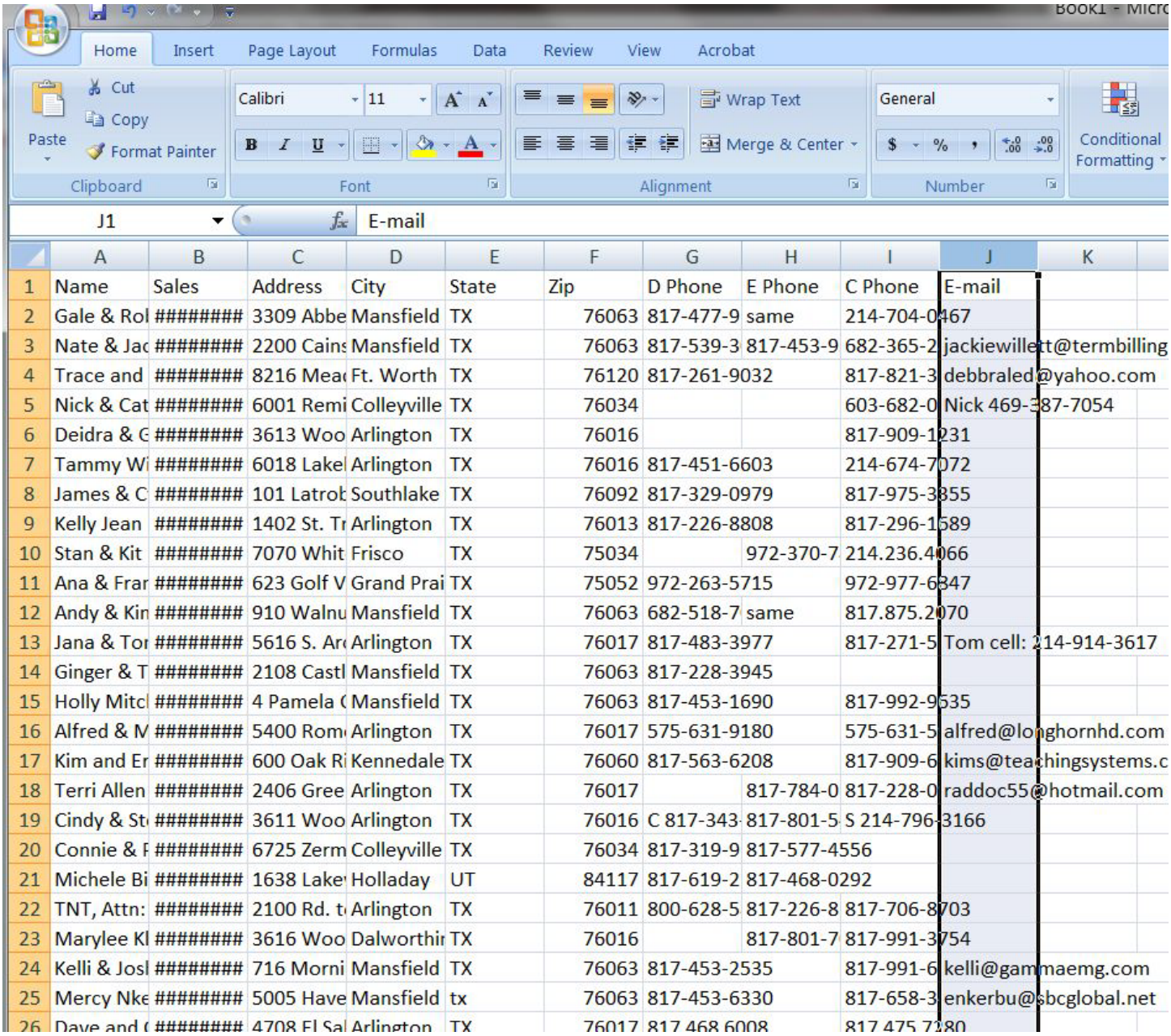
- Click the small arrow under the Paste button



- In the drop down menu that appears select Paste Special.

- This box will pop up, select Unicode Text and click OK.





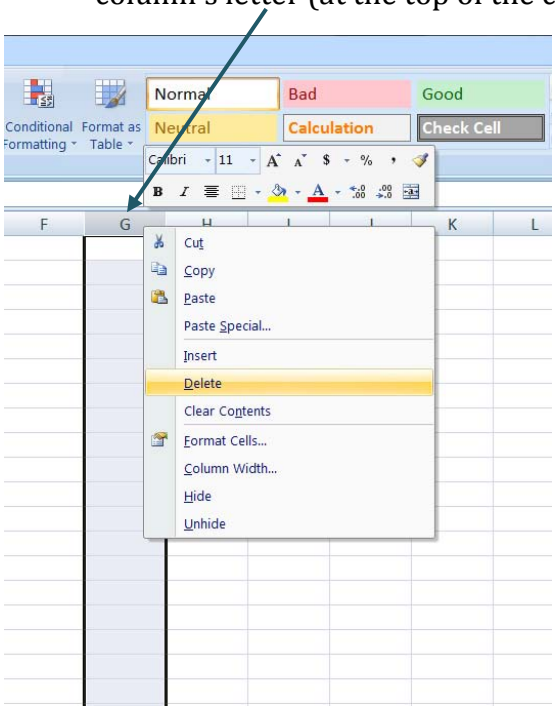
	A	B	C	D	E	F	G	H	I	J	K
1	Name	Sales	Address	City	State	Zip	D Phone	E Phone	C Phone	E-mail	
2	Gale & Rol	########	3309 Abbe	Mansfield	TX	76063	817-477-9	same	214-704-0	467	
3	Nate & Jac	########	2200 Cains	Mansfield	TX	76063	817-539-3	817-453-9	682-365-2	jackiewillett@termbilling	
4	Trace and	########	8216 Mea	Ft. Worth	TX	76120	817-261-9032		817-821-3	debbraled@yahoo.com	
5	Nick & Cat	########	6001 Remi	Colleyville	TX	76034			603-682-0	Nick 469-387-7054	
6	Deidra & G	########	3613 Woo	Arlington	TX	76016			817-909-1	231	
7	Tammy Wi	########	6018 Lakel	Arlington	TX	76016	817-451-6603		214-674-7	072	
8	James & C	########	101 Latrob	Southlake	TX	76092	817-329-0979		817-975-3	855	
9	Kelly Jean	########	1402 St. Tr	Arlington	TX	76013	817-226-8808		817-296-1	589	
10	Stan & Kit	########	7070 Whit	Frisco	TX	75034		972-370-7	214.236.4	066	
11	Ana & Frar	########	623 Golf V	Grand Prai	TX	75052	972-263-5715		972-977-6	347	
12	Andy & Kin	########	910 Walnu	Mansfield	TX	76063	682-518-7	same	817.875.2	070	
13	Jana & Tor	########	5616 S. Ar	Arlington	TX	76017	817-483-3977		817-271-5	Tom cell: 214-914-3617	
14	Ginger & T	########	2108 Castl	Mansfield	TX	76063	817-228-3945				
15	Holly Mitc	########	4 Pamela (	Mansfield	TX	76063	817-453-1690		817-992-9	535	
16	Alfred & M	########	5400 Rom	Arlington	TX	76017	575-631-9180		575-631-5	alfred@longhornhd.com	
17	Kim and Er	########	600 Oak Ri	Kennedale	TX	76060	817-563-6208		817-909-6	kims@teachingsystems.c	
18	Terri Allen	########	2406 Gree	Arlington	TX	76017		817-784-0	817-228-0	raddoc55@hotmail.com	
19	Cindy & St	########	3611 Woo	Arlington	TX	76016	C 817-343	817-801-5	S 214-796-	3166	
20	Connie & F	########	6725 Zerm	Colleyville	TX	76034	817-319-9	817-577-4556			
21	Michele Bi	########	1638 Lake	Holladay	UT	84117	817-619-2	817-468-0292			
22	TNT, Attn:	########	2100 Rd. t	Arlington	TX	76011	800-628-5	817-226-8	817-706-8	703	
23	Marylee Kl	########	3616 Woo	Dalworthir	TX	76016		817-801-7	817-991-3	754	
24	Kelli & Josl	########	716 Morni	Mansfield	TX	76063	817-453-2535		817-991-6	kelli@gammaemg.com	
25	Mercy Nke	########	5005 Have	Mansfield	tx	76063	817-453-6330		817-658-3	enkerbu@sbcglobal.net	
26	Dave and (	########	4708 El Sal	Arlington	TX	76017	817 468 6008		817 475 7280		

- The pasted text will look like this.

- If Name, Sales, Address, City, etc. do not line up with their column for some reason, simply delete the old titles and retype the titles into the appropriate boxes, as shown above.

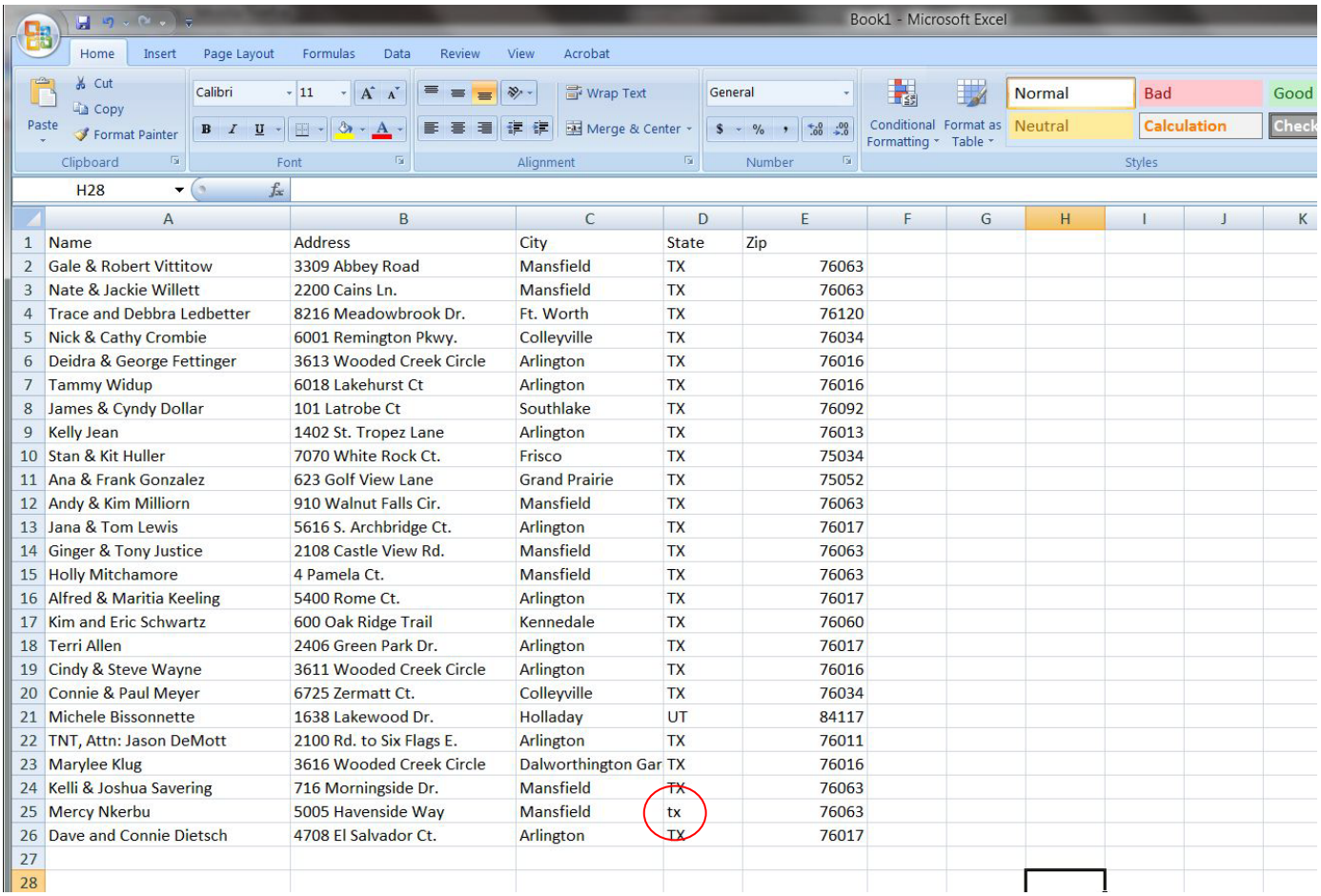
- Make each column wide enough that you can read all of the information in the box by clicking on the lines between each column header, holding down and dragging until the boxes are large enough. Do this with all of your columns.

- If there is a blank column in between columns with information in them, right click on the blank column's letter (at the top of the column)and select Delete from the right-click Menu.



- Delete all empty columns in this way.
- Then, delete the columns with Phone Numbers, Sales Totals, and Email Addresses in the same way.

- You should end up with an Excel spreadsheet that looks like the one below:

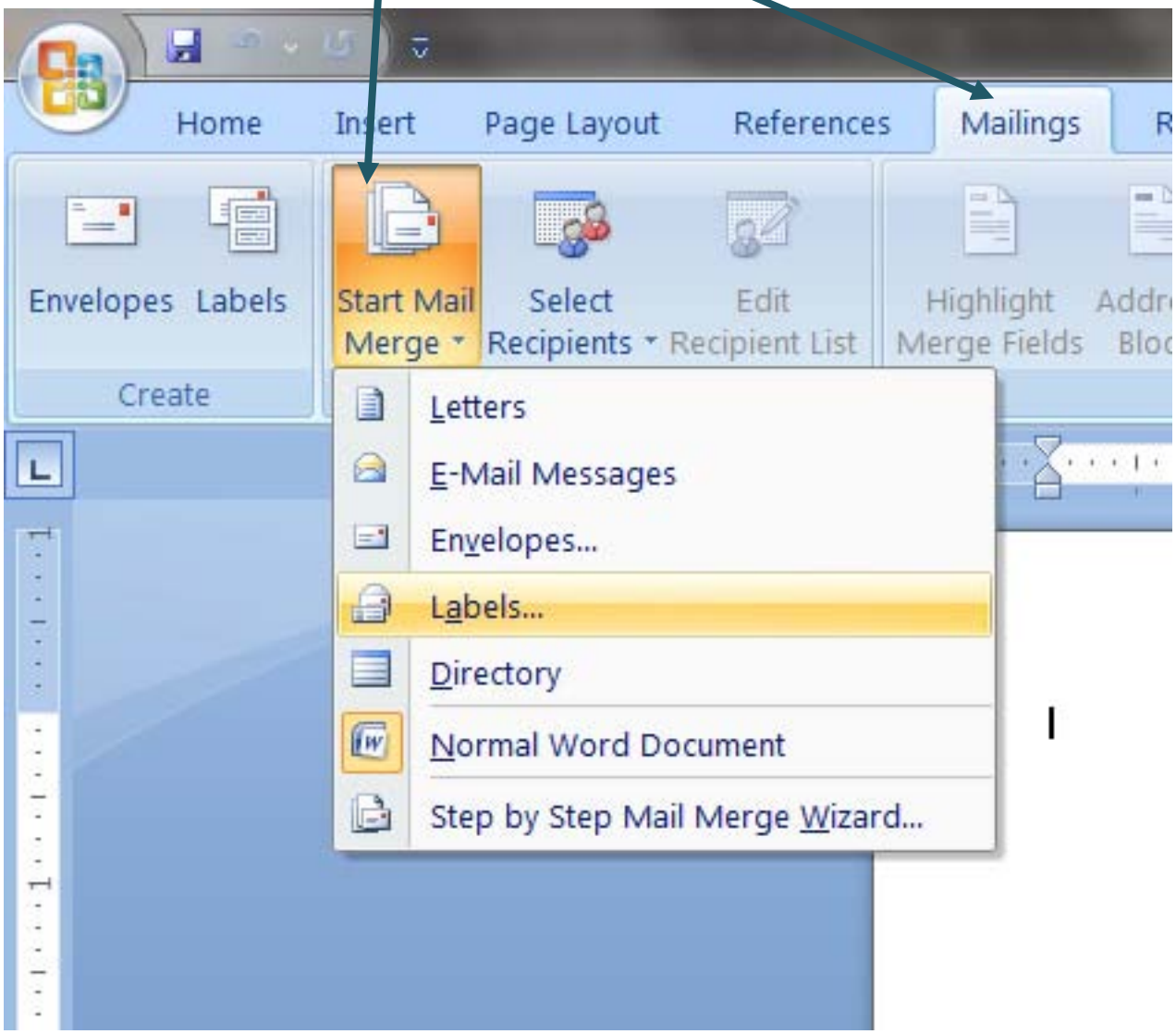


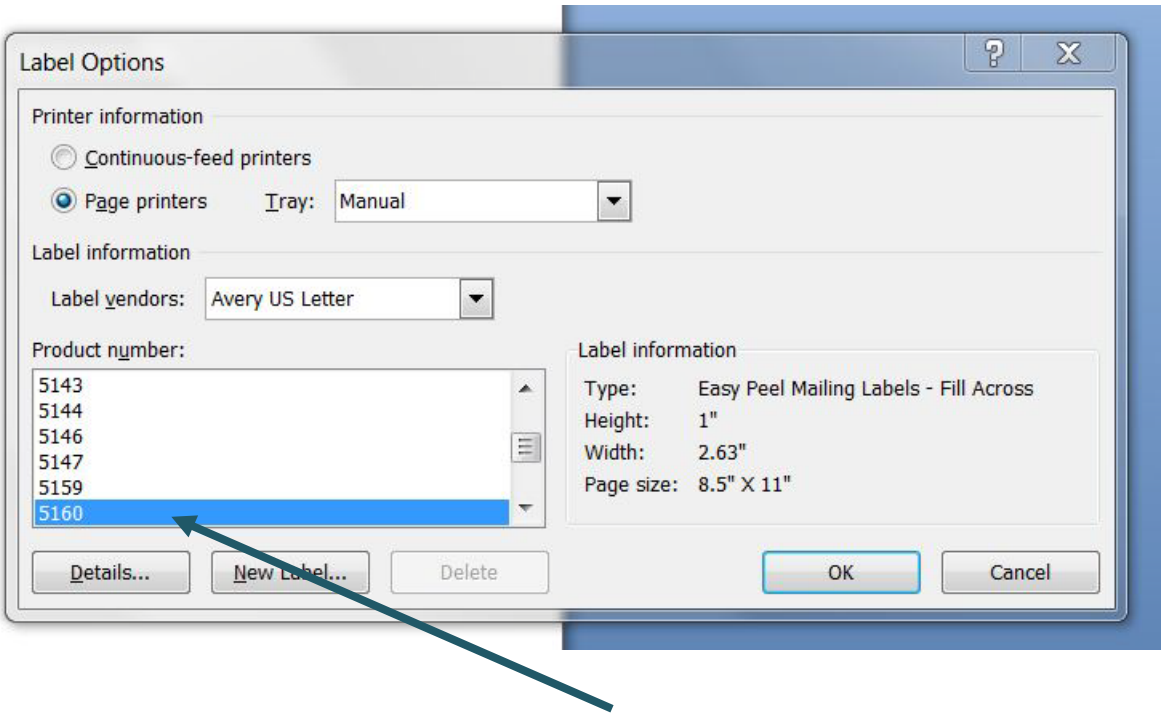
	A	B	C	D	E	F	G	H	I	J	K
1	Name	Address	City	State	Zip						
2	Gale & Robert Vittitow	3309 Abbey Road	Mansfield	TX	76063						
3	Nate & Jackie Willett	2200 Cains Ln.	Mansfield	TX	76063						
4	Trace and Debbra Ledbetter	8216 Meadowbrook Dr.	Ft. Worth	TX	76120						
5	Nick & Cathy Crombie	6001 Remington Pkwy.	Colleyville	TX	76034						
6	Deidra & George Fettinger	3613 Wooded Creek Circle	Arlington	TX	76016						
7	Tammy Widup	6018 Lakehurst Ct	Arlington	TX	76016						
8	James & Cyndy Dollar	101 Latrobe Ct	Southlake	TX	76092						
9	Kelly Jean	1402 St. Tropez Lane	Arlington	TX	76013						
10	Stan & Kit Huller	7070 White Rock Ct.	Frisco	TX	75034						
11	Ana & Frank Gonzalez	623 Golf View Lane	Grand Prairie	TX	75052						
12	Andy & Kim Milliorn	910 Walnut Falls Cir.	Mansfield	TX	76063						
13	Jana & Tom Lewis	5616 S. Archbridge Ct.	Arlington	TX	76017						
14	Ginger & Tony Justice	2108 Castle View Rd.	Mansfield	TX	76063						
15	Holly Mitchamore	4 Pamela Ct.	Mansfield	TX	76063						
16	Alfred & Maritia Keeling	5400 Rome Ct.	Arlington	TX	76017						
17	Kim and Eric Schwartz	600 Oak Ridge Trail	Kennedale	TX	76060						
18	Terri Allen	2406 Green Park Dr.	Arlington	TX	76017						
19	Cindy & Steve Wayne	3611 Wooded Creek Circle	Arlington	TX	76016						
20	Connie & Paul Meyer	6725 Zermatt Ct.	Colleyville	TX	76034						
21	Michele Bissonnette	1638 Lakewood Dr.	Holladay	UT	84117						
22	TNT, Attn: Jason DeMott	2100 Rd. to Six Flags E.	Arlington	TX	76011						
23	Marylee Klug	3616 Wooded Creek Circle	Dalworthington Gar	TX	76016						
24	Kelli & Joshua Savering	716 Morningside Dr.	Mansfield	TX	76063						
25	Mercy Nkerbu	5005 Havenside Way	Mansfield	tx	76063						
26	Dave and Connie Dietsch	4708 El Salvador Ct.	Arlington	TX	76017						
27											
28											

- Once you get to this point (as shown on p 79,) go through and check for misspellings. As you see in my example, one of the customer's addresses got entered with an un-capitalized state abbreviation. So I will need to fix that.

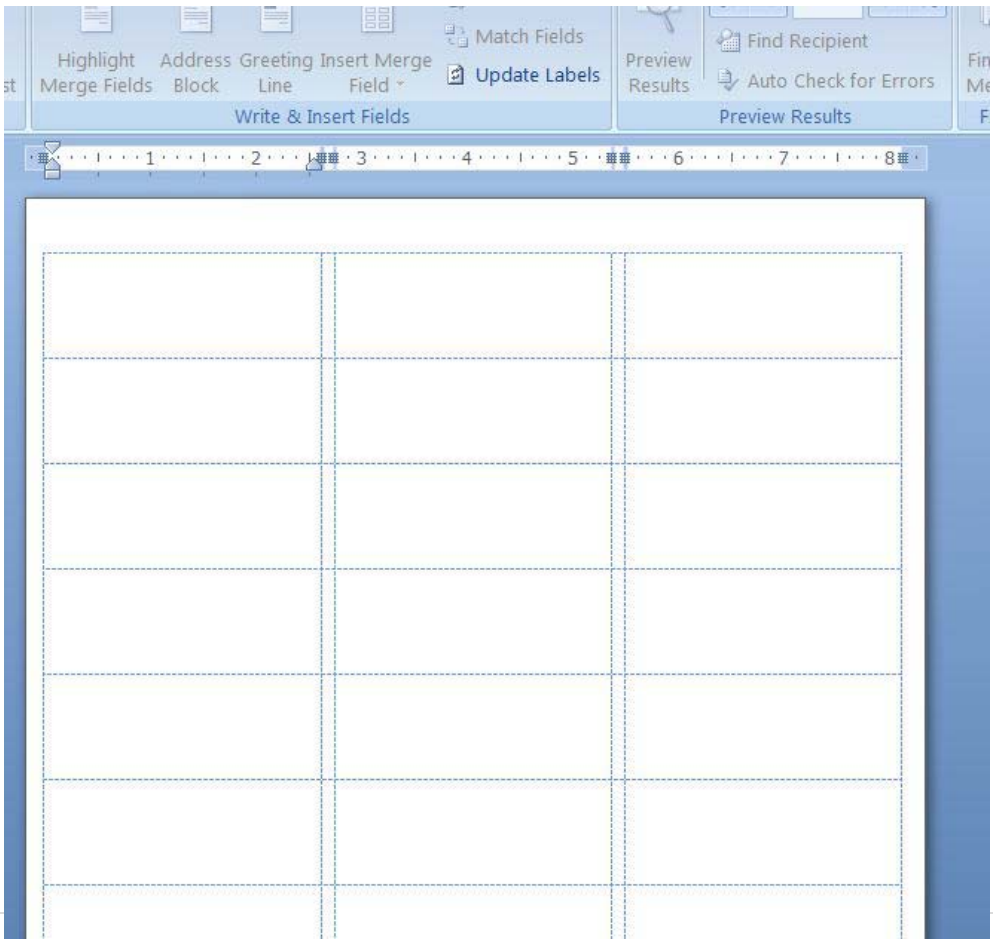
- Once you have fixed any errors, save your Excel spreadsheet as something you will recognize. I am naming mine Top 25 Customers Jan 06-Jan 11

- **Open a blank document in Microsoft Word.**
- Click on the Mailings Tab.
- Click on Start Mail Merge.
- We are making mailing labels, Select Labels...

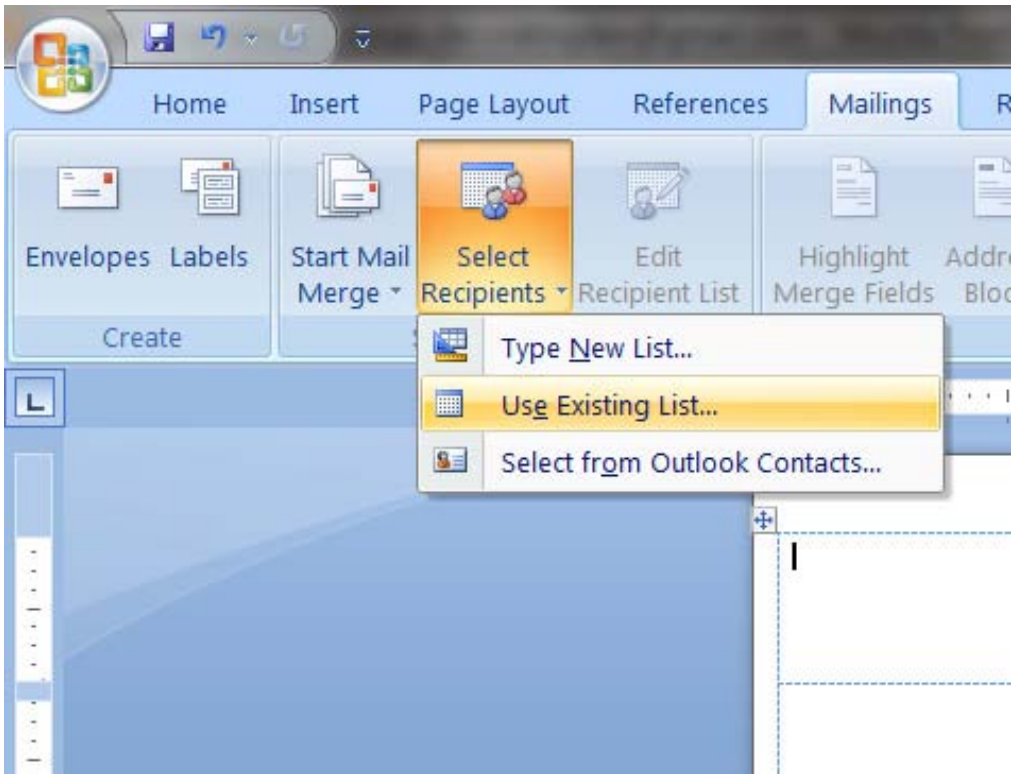




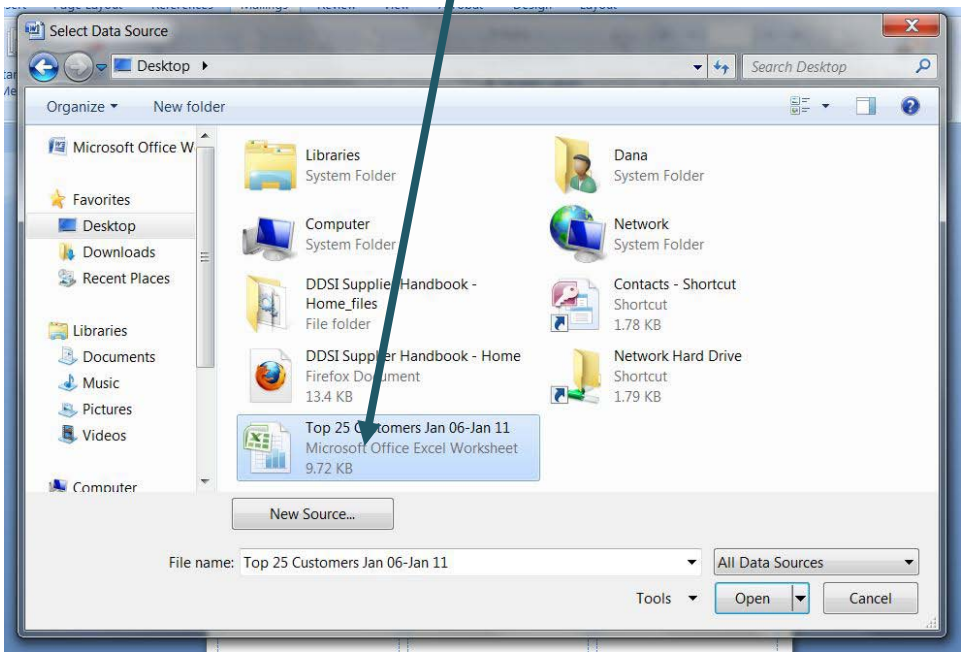
- This box will pop up.
- Select your Label Number (found on box of labels that you purchased) in the list and click OK.
- Your document will be formatted for your Labels (as shown below.)



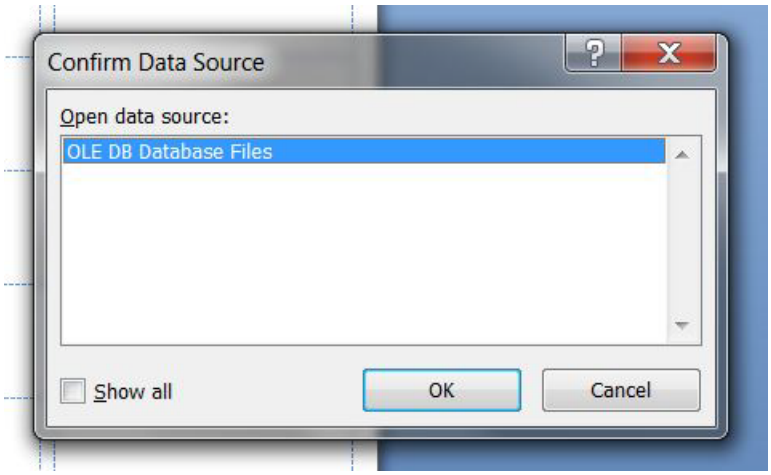
- Next, click Select Recipients and Use Existing List.
- Here you will import your Excel Spreadsheet we made earlier.



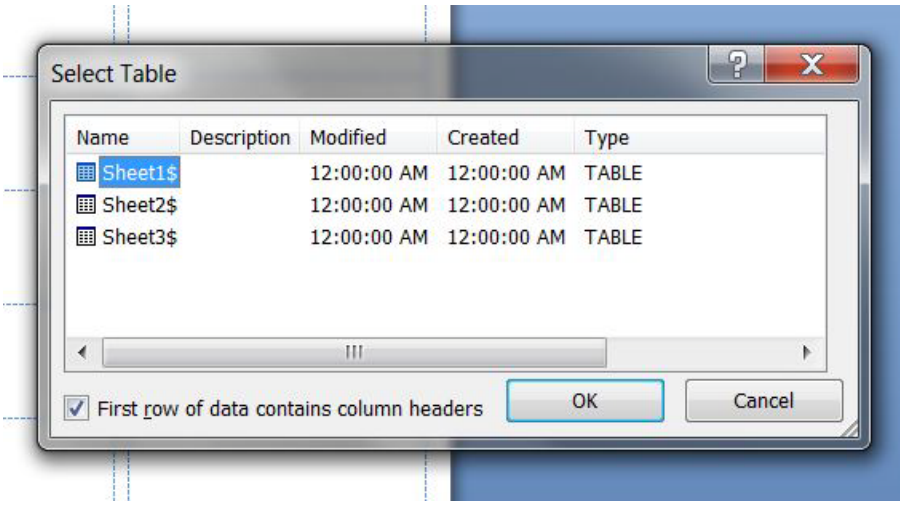
- Go to where you saved your Excel file. Select it, like I have selected mine (below) and click OPEN.

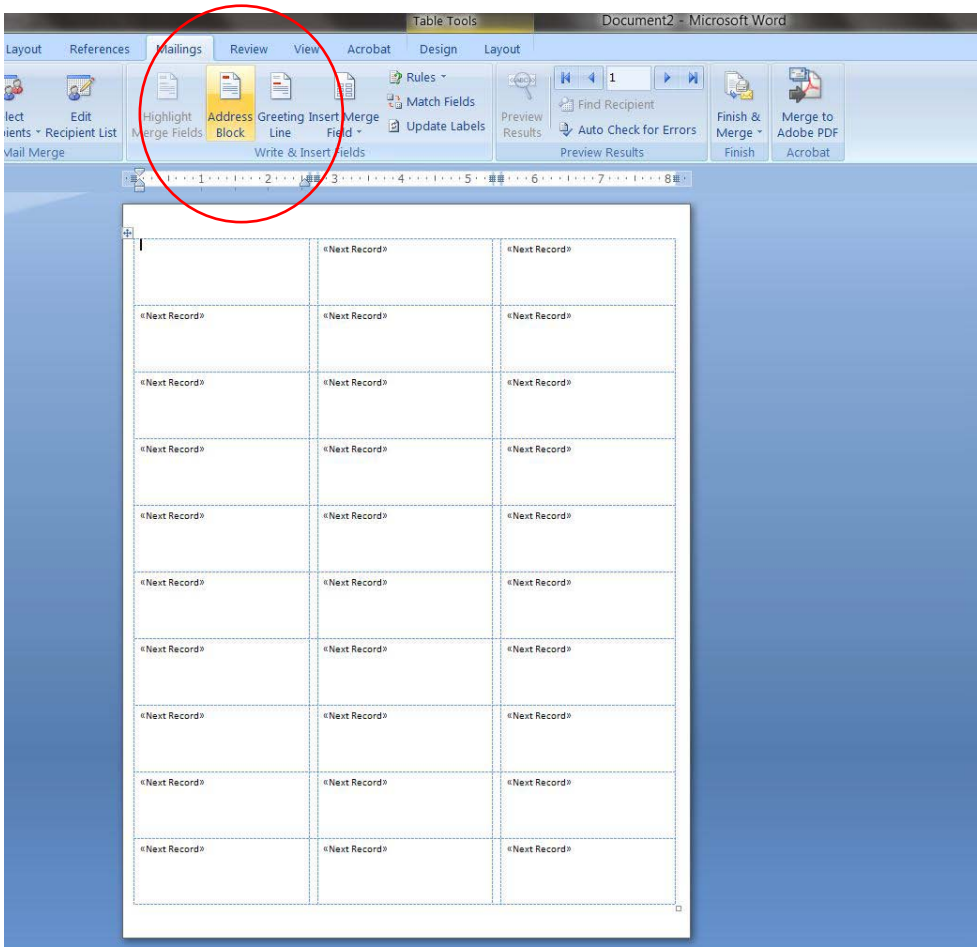


- Click OK.

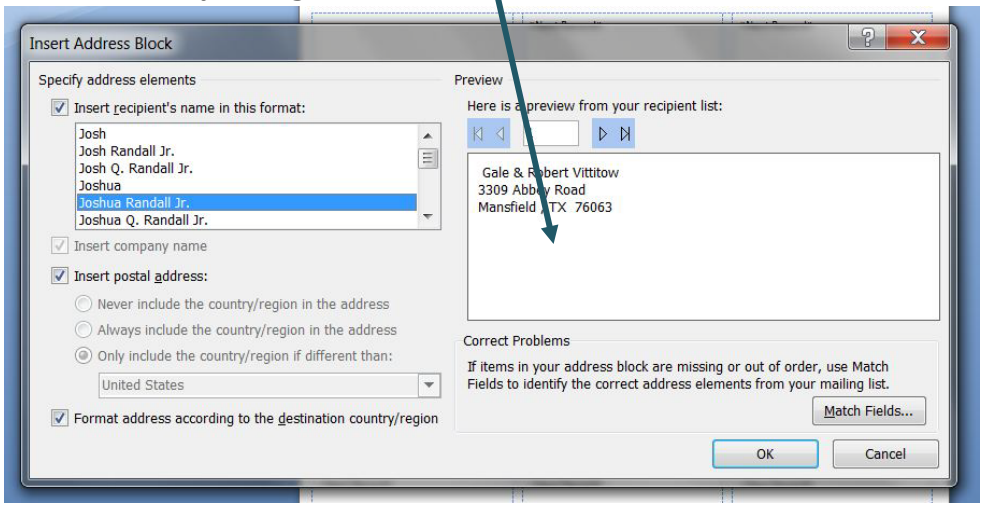


- Select the Sheet you were working on in Excel (usually Sheet 1) and click OK.



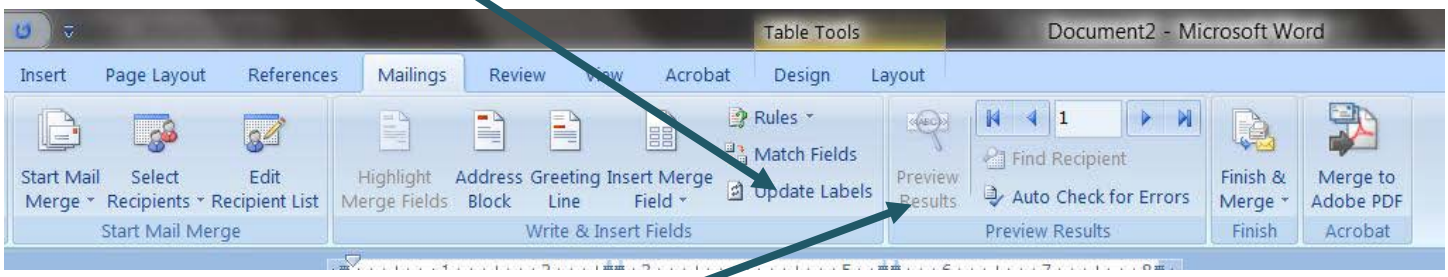


- Click Address Block.
- A box will open with a sample of what your labels will look like.
- If the address shown in the box (like this one) on your screen looks ok (formating-wise), click OK.
- If not, make any changes to the text in that box and click OK.

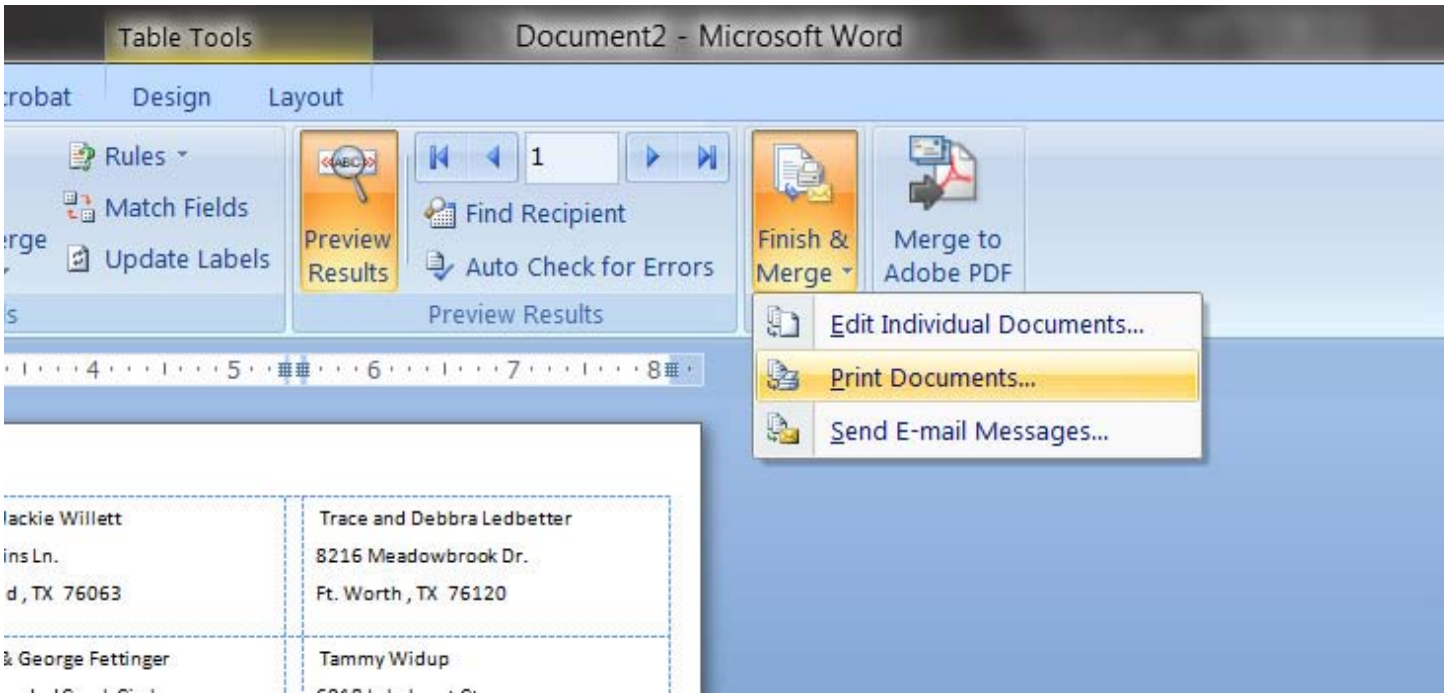

Insert Address Block
Specify address elements
Insert recipient's name in this format:
Josh
Josh Randall Jr.
Josh Q. Randall Jr.
Joshua
Joshua Randall Jr.
Joshua Q. Randall Jr.
Insert company name
Insert postal address:
Never include the country/region in the address
Always include the country/region in the address
Only include the country/region if different than:
United States
Format address according to the destination country/region
Preview
Here is a preview from your recipient list:
Gale & Robert Vittitow
3309 Abbey Road
Mansfield, TX 76063
Correct Problems
If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.
Match Fields...
OK
Cancel

NOTE: IF YOU WISH TO REMOVE SOMEONE FROM YOUR MAIL MERGE LIST IN THE FUTURE, CLICK EDIT RECIPIENT LIST AND UNCHECK THE BOX NEXT TO THEIR NAME. CLICK OK.

- Click Update Labels.



- Click Preview Results.
- If the labels are satisfactory, click Finish and Merge, Print Documents...



And...your labels are printing!

NOTE: IF YOU WANT TO MAKE CHANGES TO SPACING OR ADD AN IMAGE:

- **MAKE ANY CHANGES TO THE LABEL IN THE UPPER LEFT CORNER OF THE PAGE; THESE CHANGES WILL THEN PROPOGATE TO THE REST OF THE LABELS IN THE MAILMERGE.**
- **CLICK UPDATE LABELS, AND FOLLOW NORMAL INSTRUCTIONS FOR PRINTING.**